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LIBERATION THEOLOGY AND THE ROMAN DOCUMENT

ROMAN DOCUMENT ON THE THEOLOGY OF
LIBERATION - A THEOLOGICAL APPRASAL

Cyprian Illickamury

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STRUGGLE FOR JUSTICE AND RESPONSIBLE OBEDIENCE

Felix Podimattam

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JEEVADHARA

The Fulness of Life

**LIBERATION THEOLOGY
AND THE ROMAN DOCUMENT**

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Editorial

Right now liberation theology makes bad news. The widely read *Time* magazine, for instance, at least twice described liberation theology as a mixture of Christianity and marxism. Undoubtedly the minds of millions of readers of that magazine would have been prejudiced vis-à-vis liberation theology as this distorted judgement was offered as a fact rather than as an opinion. In similar vein misrepresentation of the theology of liberation has been the hobby of several international and national periodicals and other means of mass media. Not that liberation theology is perfect and does not need critique.

On the heels of this came the Ratzinger document of August 6, 1984, on the theology of liberation with allegation raised about its marxist content. This is the hostile environment in which liberation theology finds itself at the moment.

At such a juncture it would be interesting to note that to date no word of condemnation has emerged from Pope John Paul II, notwithstanding the publication of the Roman document and the subsequent controversy on the issue. Much to the chagrin of the opponents of liberation theology, the Pope refrained from any reference to it in his address to the Peruvian bishops in Rome in autumn 1984 and in his subsequent visit to the Dominican Republic. As if this were not enough, according to informed sources in Rome, Pope John Paul intervened personally in favour of including the positive aspects of the theology of liberation referred to in the first half of the Roman document.

Knowing fully well how hard it is to turn the tide in favour of a more fair understanding of liberation theology, especially in our world of quick and facile media

judgements, the present issue of *Jeevadhara* makes a modest attempt to show that the revolutionary thing about liberation theology is not any alleged marxist content but the miracle of the Good News coming alive for the oppressed, of theology grounding itself, among other things, in the experience of the poor and speaking to them, and of their wanting to grow as a community that is more loyal to the Church even as they try to respond to the demands of their human dignity.

The contributors of the articles are a systematic theologian, a pastoral theologian, a social activist and a moralist.

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Felix Podimattam

Roman Document on the Theology of Liberation - a theological appraisal

To evaluate any reality a fair knowledge of its historical background is absolutely necessary. That holds good also for the Roman document on the theology of liberation. Hence we shall try, first of all, to cast a quick glance at the historical background of the theology of liberation, and of the Roman document dealing with it (I). It will be followed by an examination of some dangerous tendencies in the theology of liberation, which make the Roman document a timely reminder and warning (II). The last part contains a few difficulties and questions (III). Since the document itself says that it has a limited purpose and invites theologians to collaborate loyally and in a spirit of dialogue with the magisterium, this part and also the whole article, it is hoped, will be a contribution to the ongoing dialogue on the theology of liberation.

I. The historical background

Obviously we cannot here go into a detailed sketch of the historical background of the theology of liberation. That would take us centuries back into the political, social and religious scenario of Latin America.¹ We shall merely mention a few events of the last quarter of a century, which directly or indirectly influenced the rise and popularity of this new trend of theological thinking, and then pass on to the historical background of the Roman document itself on the theology of liberation. By the middle of our century the masses of Latin America were becoming more and more aware of the stark contrast between their

1. For a brief review of this scenario, cfr. J. Andrew Kirk, *Liberation Theology. An Evangelical View from the Third World*, London 1979, 3-22

human dignity and the utter poverty, misery and ignorance to which the great majority of them were condemned to live in their own homeland of rich natural and human resources. They became conscious that the poverty and underdevelopment to which millions of them were condemned was not the result of any inexorable fate, but that it was simply man-made. About 30% of the people owned almost all the land as well as all the resources and means of production. Economic, political, social and educational power was all concentrated in the hands of these few, who exercised it in collaboration with vested interests outside the country for their own advantage and the disadvantage and dehumanization of the vast masses. In fact, very often this privileged minority acted merely as puppets of outside interests. Numerous studies of Latin American economists and sociologists showed with undeniable statistics that the continent was economically under the dominance of international monopolistic interests and culturally it was dependent on initiatives and forces operating from outside².

The misery of the masses suffering from poverty, diseases, malnutrition and the inhuman consequences of discrimination, had come to the breaking point under the increasing repression by military governments in countries like Brazil, Argentina, Paraguay and Bolivia. There was seething unrest in the continent. The experience of Cuba in 1959 showed that changes were possible. The Cuban revolution which succeeded in overthrowing the Battista dictatorship sponsored by the U.S.A. was at first a national revolution, but the inexorable hostility of the United States drove it into the arms of Communism.³ The great Brazilian Catholic educator Paulo Freire had exerted great influence with his new thinking on the subjects of underdevelopment, change and humanization on those working

2. Ibid. 20

3. J. Kottukapally, S. J., *Liberation Theology and Marxism*, in: *Vidyajoti*, 49 (1985) 347-63. 349. Kottukapally quotes the authority of David McLellan, *Marxism after Marx*, London 1972, 242 and the US scholars R. Scheer and M. Zeililin (cfr. footnote 9)

for the uplift of the masses in the underdeveloped north eastern parts of Brazil. Many had adopted with enthusiasm Freire's method of "education as the practice of liberty". But the Brazilian military coup of April 1964 and the systematic suppression of those who had adopted the method of conscientization as advocated by Freire were a severe blow to their expectations. Thinkers in Brazil and the whole of Latin America now began to investigate more deeply the dynamics of power which enabled the reactionary forces to suppress so easily the efforts for the transformation of an unjust and exploitative society and for the elimination of poverty and human degradation⁴. At the same time Latin American economists and political thinkers began to question the concept of underdevelopment elaborated in the North. They began to use Marxist categories to understand the causes of the poverty and stagnation in Latin America. Rejecting the concept of development bound up with a liberal economy, they devised their own category. They came to the inevitable conclusion that poverty was the direct result of exploitation, since dividends on investments and loans with high interest from the rich nations pumped out more capital from Latin America than what was given as aid.

It was against this background of the poverty and dehumanization of the masses of Latin America and their economic, political and cultural dependence that laymen, priests and theologians committed to the cause of the poor began to reflect on the meaning of their Christian faith. The theology of liberation, we can say, has its roots in these reflections and to the consequent commitment to the praxis of this faith.

The Second Vatican Council, especially the Pastoral Constitution on the Church in the Modern World and the encyclical "Populorum Progressio" of Pope Paul VI,

4. In 1973 the phenomenon repeated itself in Chile where president Salvador Allende, who had been democratically elected in 1971, was murdered in a coup supported by the CIA, and military dictatorship was again imposed on the country.

made a great impression in Latin America. In the years 1965-68 leading Christians like Paulo Freire and also organized groups both within and outside the Church demanded a change of unjust social structures⁵. Concepts like dependence, poverty, oppression and liberation became objects also of theological reflection and called for a new pastoral praxis. In the light of the utter failure of the theories of development reflections came up which aimed at the process of liberation of the whole man and all men. They demanded pastoral commitment to the poor as the first or privileged addressees of the kingdom of God. In this reflection over the whole of faith they took the Latin American situation as the starting point.

In 1968 came the Second General Conference of the Latin American Bishops (CELAM) in Medellin (Columbia). It took up commitment to the poor and liberation of the oppressed as its own decisive programme. The Conference speaks very much the language of liberation theology. In it the Church of Latin America makes its decisive option for the poor, declaring itself ready to give up its position on the side of the rich and the mighty and to take up position on the side of the poor. In the following years the church in Latin America made great efforts to put this programme into practice. Difficulties were not wanting to guide the vitality and social engagement especially of the younger clergy to pastoral paths. Among the conservative bishops protests were loud that it all amounted to "horizontalism" and the reduction of Christian faith to worldly goals. The governments in almost all the Latin American states, seeing the danger to their own positions of power and privilege, let loose a campaign against the so-called "subversive", "revolutionary", "communist" clergy. Some leftist oriented priests did actually form groups and came into conflict with the

5. For the various phases of these developments, cfr. G. Burchardt, Rom urteilt zu undefiniert. Etappen eines noch ungelösten Konflikts, in: Herder Korrespondenz 38 (1984) 480-87. I have derived my information mostly from here.

hierarchy. Some like Camilo Torres (shot dead in 1966) ceased to function as priests and joined the guerillas. But in spite of such tensions in the Latin American Church Pope Paul VI and the Roman authorities exercised moderation and showed no tendency to intervene directly.

After the Conference of Medellin and especially after 1970 several biblical and theological seminars were held in Buenos Aires, Bogota, Ciudad Juarez (Mexico), Oruro (Bolivia), and so on, on the theme of liberation. Even the daily press was not behind to catch up with the theme. In 1971 appeared in Lima (Peru) Gustavo Gutierrez's *The Theology of Liberation* as the first systematic outline of the theme of liberation. It had actually grown out of the lectures he had given in 1968 in connection with the Conference of Medellin. It was followed by Leonardo Boff's *Jesus Christ Liberator* published in Brazil in 1972 Hugo Assman's *Theology of the Practice of Liberation* published in Salamanca in 1973, and J. L. Segundo's *Liberation of theology* published in Buenos Aires in 1975. In the mean time there appeared also numerous writings of different quality on the theme of liberation. But one thing they all had in common, namely, they tried to reflect on the faith from their concrete social experience in view of praxis.

In 1975 appeared Pope Paul's encyclical "Evangelii Nuntiandi". It treats in detail the meaning of the liberation of man for evangelization. The Pope sees an inner connection between human liberation and salvation in Christ (no. 35). He warns against the danger of reducing the mission of the Church to "this-worldly programmes" and at the same time against a spiritualized understanding of the Church that is disinterested in temporal problems. He sees in the numerous basic Christian communities coming up in Brazil the "hope of the Church" (no. 58).

Slowly the first signs of tension with the Roman magisterium appear. After two years of preparation the International Theological Commission published in 1977 the document "The Relation between Human well-being

and Christian Salvation''⁶. Its aim was to bring the "chances and dangers''⁷ of the theology of liberation. It appreciates the "many valuable elements of the theological project", like emphasizing the unity of salvation history and world history⁸. But cautious critical judgements over at least some directions of liberation theology are predominant in this document. Although the historical world is the place where the salvific work of God meets man, "faith as praxis" must mean more than the change of unjust social conditions, says the document⁹. So too, about applying the Marxian social analysis it says: "When one uses such theories and analyses, one must be conscious that these contain no greater truth-value because theology uses them in its statements''¹⁰. The language of the document was moderate, dialogal, devoid of any paternalism. It is surprising that the Roman document mentions not a word about this document of the International Theological Commission.

About this time the Congregation of Faith had already the plan to publish a document, condemning in general the theology of liberation. Probably it had even prepared a document in collaboration with the papal commission "Justice and Peace". It seems, however, that Pope Paul, who had already exhorted to prudence and caution in this delicate matter, was not in favour of publishing it.

In the same year 1977 a few conservative theologians of West Germany published a memorandum on the theology of liberation and started a campaign against it. The campaign was spearheaded mainly by a study circle that was started in 1973 under the name "Church and Liberation". Its members belonged to West Germany and Latin America. A common hostility to the theology of liberation

6) Zum Verhältnis zwischen menschlichem Wohl und christlichem Heil Schlußdokument der Vollversammlung der Internationalen Theologenkommission vom Oktober 1976 in Rom- Deutsche Fassung, in: Karl Lehmann et alii, *Theologie der Befreiung*, Einsiedeln 1977, 173-95

7) Ibid. 175 8) Ibid. 178

9) Ibid. 179 10) Ibid. 180 (tr., C. I.)

bound them together. Prominent among them were Bishop Franz Hengsbach of Essen and Alfonso Lopez Trujillo, then auxiliary bishop of Bogota and now Cardinal Archbishop of Medellin. The latter, first general secretary and later president of the Latin American Bishops' Conference, tried his best to add strength to the conservative party of the Latin American bishops during their third General Conference at Puebla. Through continuous contact with the director of the Latin American Commission in Rome and prefect of the Congregation of Bishops, Cardinal Sebastiano Baggio, he and his friends gained great influence in Rome.

The Third General Conference of the Latin American Bishops took place at Puebla in 1979. In spite of the determined efforts of the conservative group, the bishops in general decided definitively for an "option for the poor" and made it the basic concept of the pastoral praxis in Latin America. Although theologians of liberation did not directly take part in the Conference, important elements of liberation theology entered into and decisively influenced the final document. From this time on the Congregation of Faith was much concerned about the theology of liberation. Leonardo Boff had a long exchange of letters with the Congregation in 1979/80 about his book "Christ the Liberator". Also the writings of other liberation theologians were examined by the Congregation. Gustavo Gutierrez was a special object of its vigilance. That became known first in 1984, when the Bishops Conference of Peru was asked by the Congregation of Faith to examine the theology of Gutierrez. But the Bishops' Conference avoided a condemnation of Gutierrez, especially due to the intervention of the Archbishop of Lima. That was probably the reason why the Bishops' Conference of Peru was called to Rome for two weeks in the months of September / October 1984 and also the reason why Leonardo Boff's case was decided to be settled in Rome.

In January 1984 the Peruvian review "Oiga" published an anonymous article, criticising liberation theology. The same article appeared in March 1984 in the review "30 Giorni" (30 days), which belongs to the conservative

Italian movement "Communion and Liberation". Here the author was named — Cardinal Joseph Ratzinger. A slightly revised text appeared in "Neue Ordnung" published from Walberberg in Germany in August 1984. In a forward Cardinal Ratzinger said that the anxiety of many Latin American bishops has been brought home to him that the radical positions of the most prominent liberation theologians are becoming dangerous to the Church. So it is clear that some of the bishops of Latin America themselves have been goading on the Congregation of Faith for the condemnation of liberation theology.

Leonardo Boff and his brother Clodovis Boff answered Ratzinger in a five-point memorandum, which was published in "Il Regno" of 15th April 1984 ¹¹. They agreed with the theological positions formulated by Ratzinger but said that they can hardly recognize themselves and their positions in the descriptions of his article. They admitted that there are some infelicitous and clumsy formulations in their theology, which was inevitable because of the pioneering nature of their theological reflection ¹². Against the accusation of holding on merely to a this-worldly salvation they aver that liberation theology stands for the integral liberation of man, which comprehends also the transcendental dimension: the liberation from sin and the gracious communion with God. They emphasize the concept of grace and sin, faith and unbelief, conversion, prayer, etc. ¹³. They insist that liberation theology makes use of Marxism only as a medium, as an instrument, for the analysis of society. It is made use of only for the communication of something greater, i.e., for faith and its historical imperative. It is thus a question of sublation, that is to say, critical and surpassing appropriation ¹⁴. Finally, they express also concern that such documents from Vatican can easily become a political instrument in the hands of those who

11. It is published in: Vaidikamitram, March 1985, 77-88

12. *Ibid.* 78f.

13. *Ibid.* 83

14. *Ibid.* 84-86

15. *Ibid.* 88

oppose every societal change, an instrument to inflict still greater suffering on the poor, to discredit the Church further and to blaspheme the name of God ¹⁵.

The Congregation of Faith, however, was not satisfied with such explanations. Two important decisions were made by it. One was to call Leonardo Boff to Rome for a colloquium, which was to end up in the imposition of silence on him for a period of time. Although Cardinal Ratzinger said in a television interview, broadcast on Italian state television on July 5, 1985, that Vatican's problems with Boff were "not based on his theology of liberation, but on problems of interpretation of Scripture and ecclesiology" ¹⁶, there is no doubt that Boff's stance on the theology of liberation has also been a contributing factor for the punishment ¹⁷. For Boff's theology of liberation, we know, is closely bound up with his interpretation of Scripture and ecclesiology. The second important decision made by the Congregation of Faith was the issuing of the present document on the theology of liberation.

II. Some dangerous tendencies in the Theology of Liberation

Saying that the gospel is a message of freedom and a force for liberation (intro.), and that the aspiration for liberation is a principal sign of the times (I, 1), the document acknowledges that the theology of liberation, centred as it is on the biblical themes of liberation and freedom, is quite valid (III, 4). Thus it affirms that there is and there should be a true and authentic theology of the integral liberation of man. This itself is a quite positive aspect of the document, as Fr. Kolvenbach, the General of the Jesuit Order has said ¹⁸. The expression "theology of liberation" refers, according to the document, "first of all to a special concern for the poor and the victims of oppression, which in turn begets a commitment to justice" (III, 3). Aware of

15. *Ibid.* 88

16. Cfr Examiner, July 27, 1985, 685

17. G. Burchardt, Rom urteilt, 485

18. Cfr. Vaidikamitarm, March 1985, 73

the acute situation of the world today (IV,1), of the scandal of shocking inequality between the social classes (I, 6), of the lack of equity and a sense of solidarity in international transactions (I,7) and recognizing also the causes of poverty and injustice especially in South America (VII, 12) the document clearly pronounces in favour of the "preferential option for the poor" (intro.). It explicitly calls for struggle for justice, freedom and human dignity (intro.; XI, 2). The document should not be understood, it says, as a condemnation of those who have generously and in the spirit of the gospel made the option for the poor (intro.), nor as an approval of those who keep the poor in misery (XI, 1). It also positively recognizes the documents of Medellin and Puebla. That the document has acknowledged the legitimacy of a theology of liberation, is itself a fact of which liberation theologians can be proud of. Without their hard work for the last twenty years this would not have been possible, as the English review *Tablet* (8-9-1984) said. The document has acknowledged at its very beginning that it is not against the theology of liberation as such, but only against certain exaggerated views and deviations of some theologians of liberation. One cannot deny that there are certain exaggerated positions and opinions in the writings of some theologians of liberation which tend to be dangerous. The warning of the document against such trends surely deserves understanding and respect.

In Latin America the Church faces a really critical situation. Bishops, priests and communities stand before the difficult and dangerous duty of criticizing in the name of the gospel an established order that denies human dignity and oppresses man beyond all endurance. Here the temptation can easily arise for the spiritual leaders to become political leaders and the communities to covert themselves to parties. If that happens, it can easily lead to a "political messianism". Faith itself would stand in danger of being replaced by ideology. A warning here is surely in place, so that spiritual leaders may become aware that their function is to help individuals and groups to realize

and practise their own autonomy and maturity in the socio-political spheres, guided by the light of faith ¹⁹.

The antagonism already present in the Latin American society can lead to the temptation to make the gospel an instrument of politics and class struggle. The political and economical bosses who are the beneficiaries of the present situation consider the gospel as the spiritual possession of a privatized religion, which has to be defended against the threat of Marxism and anarchy by means of the power of the present political establishments. Christian faith is seen here as a private affair having no bearing on socio-political conditions. There are bishops, priests and laity who think in this line. When theologians react against such one-sided views, they sometimes go to the other extreme. Here the Roman warnings have their legitimation when these admonish that faith and Church cannot be subordinated to politics, that the hierarchy of the Church is not to be identified with the oppressive class, and that the "Church" and "church of the people" should not be placed in opposition to each other ²⁰.

No one need disagree with the document when it warns against subordinating the interpretation of faith to a Marxist conception of the whole realm of reality. Prominent representatives of liberation theology today are against all such subordination and they can no doubt wash their hands clean of such suspicions or accusations. Movements like "Christians for socialism" and the "Sandinistas" are certainly a cause of concern for the Church. Liberation theologians like Leonardo Boff and Clodovis Boff in their five-point reply to Cardinal Ratzinger have admitted that there have been a certain fusion and confusion between Marxist and theological concepts as well as certain exaggerations and carelessness in the

19. Peter Hunermann, *Lateinamerikas Staatsklasse und die Armen*, in: *Herder Korrespondenz* 38 (1984) 475-80. 478

20. *Ibid* 479

application of the Marxist categories ²¹. Timely warning, we must admit, will be a useful corrective and will call for the necessary caution.

III. Difficulties and questions

I. The question of methodology

The document says in the introduction that it is only against certain forms of liberation theology which use concepts from Marxist thought in an insufficiently critical manner. Again it says that it speaks only of those currents of thought which under the name of the *theology of liberation* seriously depart from the faith of the Church (VI,9). After having done so, the document speaks indiscriminately against the "theology of liberation", "theologies of liberation" and "theologians of liberation" without any distinction (cfr. III,3; VIII,1; IX,1; IX,13; X,1:4-5; XI,1:15-17). We should not, therefore, be surprised at the negative stance taken against the theology of liberation by a number of bishops and some journalist-theologians in Kerala. Was this also the intention of the document? Cardinal Ratzinger himself said in the forward to the previous document published in "Neue Ordnung" that the "most prominent of the liberation theologians" are representing positions incompatible with faith²². There Ratzinger says that "by the analysis of the *phenomenon of the theology of liberation* a fundamental danger to faith becomes visible"²³. In an accompanying report of the present document it was said that no name of any liberation theologian is mentioned, lest other liberation theologians may think that they do not come under the censure of the document. All that gives us the impression that the document's intention is to attack liberation theology in general²⁴. The limiting clauses expressed in the introduction and in

21. Cfr. Vaidikamitrām, March 1985, 84-86

22. G. Burchardt, *Rom urteilt*, 482

23. *Ibid.* 483 (tr.: C. I.)

24. Of course, one will have to wait and see the kind of liberation theology expected from the Congregation of Faith, as announced by

VI,9 seem to be mere "saving clauses". And the tragic thing about it is that the document with its indiscriminate attack on the theology of liberation has played into the hands of the oppressive regimes²⁵ who have a black list of all liberation theologians including many bishops, priests, religious and laity. While declaring its option for the poor, in practice the document seems to make a different option.

2) Questions from theology

a) The Concept of Sin

The document's understanding of sin is quite individualistic. It does not seriously take into account the insights of present-day theology with regard to the interpersonal and sociological components of sin. Is sin such an individual and private matter in the heart of man with no serious mutual repercussions and influences on the structures and institutions of human life and vice versa? Slavery, injustice, oppression etc. are seen as mere consequences or by-products of sin. What about them when considered from the part of their perpetrators? Are they not sin radically opposed to the spirit of Christ? Has not the Church the obligation to liberate them from these terrible crimes against humanity? In trying to do so the Church is committing itself not only to justice but also to "justification". Making a distinction between sin (as the most radical form of slavery) and other forms of slavery, the document plays down the latter from the part of their perpetrators and sees them only from the part of the victims. The fact that the perpetrators are well entrenched in their positions of power and privilege through structures which, even though they may not themselves have created, still enable and encourage them to continue their practices of injustice and oppression, does not make their

the present document. According to liberation theologians themselves a theology of liberation cannot be produced simply from above. It has to grow from below as a dynamic process and interplay of faith - praxis - reflection.

25. Peter Hennermann, *Lateinamerikas Staatskirche*, 479

sin any the lighter. Exploitative and oppressive structures which cause some people to perpetrate injustice or sin and other people to be crushed and dehumanized, cannot be called mere consequences or byproducts of sin. Blind refusal to recognize these structures for what they really are and to live within such structures enjoying their sinful benefits with the pretence of virginal innocence is a thoroughly unchristian attitude. The moral science can judge it only as culpable or even malicious ignorance, not excusing one from sin. Christ confronted the class oppression of the pharisees and other jewish leaders with very stern warnings of woes. He did not make it innocuous, calling it mere by-products of sin. The document does not seem to take seriously the power of sin or *the sin* of which St. Paul speaks so strongly in his Letters²⁶. It is also averse to the use of such expressions as social or structural sin, sinful structures, etc. For it there are only social effects of sin (IV, 14-15). One speaks of sinful structures in Latin America and elsewhere especially where man's fundamental rights are denied by the established public authorities. The denial of human rights is a sure criterion for judging that the motive of action is unethical. It is the denial of a person's selfhood and human dignity. Therefore it is quite justified to consider the creation and maintenance of a public order which denies human rights as immoral conduct and that order itself as sinful structure²⁷.

The International Theological Commission set up by the Pope, in its document on the theology of liberation in 1977 gives us much deeper insights regarding the relationship between sin and unjust structures, even when it says that it is problematic to speak of "institutionalized sin" or "sinful structures", seeing that the biblical word *sin* originally belongs to the context of an expressly personal decision in freedom. But there can be no doubt, it

26. Cfr. Theological Dictionary of New Testament, ed. by Gerhard Kittel, Vol. (Michigan 1964), 308-13

27. Cfr. Peter Hunermann, *Lateinamerikas Staatsklasse*, 477

says, that through the power of sin injustice can enter into the socio-economic and political institutions. That calls for a reform of unjust conditions and structures, which was not so clearly realized earlier²⁸. Heinz Schürmann, in his paper presented to the Theological Commission, summarized the point quite aptly, quoting the words of H. Buechele: "The change of structures without man's change of himself is a materialistic or collective illusion. The change of self and person without the change of structures is an idealistic or liberalistic illusion."²⁹

Conversion and social change, according to the document, are to be brought about by appealing to the "moral potential" of the person and to the constant need of interior conversion (XI, 8). Only if people (i.e. the rich and the oppressor: C.I.) collaborate freely in these necessary changes through their own initiative and in solidarity, they will grow in humanity (IX, 7; XI, 8). In the questions of sexual ethics I wonder if such liberal positions would be tolerated. Would a document of the Congregation of Faith say that it is enough to make appeal to moral conscience and that there is no need of laws to prevent such practices as artificial birth control, pre-marital sex etc. or that prohibitory laws could be repealed, appealing to man's "moral potential" ?

b) The Conception of Salvation

The document's conception of salvation seems to be characterized by a sort of dualism, and by the tendencies of an undue spiritualization and individualization. The liberation theologians speak of the salvation of the whole man and of all men and that is quite in agreement with the gospel. This-worldly liberation (i.e. liberation from hunger, slavery injustice, oppression, etc.) is also implied in the salvation

28. Zum Verhaltins (no. 6 above), 178, 186f

29. Heinz Schurmann, Das eschatologische Heil Gottes und die Weltverantwortung des Menschen, in: Karl Lehmann et alii, Theologie der Befreiung, Einsiedeln 1977, 45-78, 69 (tr. C. I)

that Jesus proclaimed³⁰. This is a basic insight of theology today and most theologians agree with the theologians of liberation on this point³¹. The Papal Theological Commission too, is quite emphatic on this point³², even when it warns against all one-sidedness. Holding that the liberation brought by Jesus is above all from sin (X,7), the document says that the New Testament does not require any change in political or social conditions for accepting redemption (IV, 13). That is tantamount to saying that freedom or slavery is indifferent with regard to redemption.

At the same time the document accuses liberation theology of this-worldly messianism, of proclaiming a purely earthly gospel (VI. 4; X, 6). No serious liberation theologian holds such a view. They have protested repeatedly against such accusations³³. It is true that they insist also on this-worldly salvation. The document itself has spiritualized salvation, minimizing and almost denying its worldly and bodily dimensions. This has also very negative repercussions on its eschatology and on the Christian duty of commitment to the world. The Constitution on the Church in the Modern World and the encyclical "Populorum Progressio" exhort the Christians wholeheartedly to commit themselves to building up a better world. God's Spirit is present in the movements for social change and spurs on man to commit himself to it. What man achieves, becomes a figure, a preparation for the kingdom of God³⁴.

30. H. Flender, *Botschaft Jesu von der Herrschaft Gottes* Munchen 1968, 23-65

31. For example, Hans Urs von Balthasar, *Heilsgeschichtliche Überlegungen zur Befreiungstheologie*, in: Karl Lehmann et alii, *Theologie der Befreiung*, Einsiedeln 1977, 155-71. 163-68

32. Zum Verhältnis (no. 6 above) 186

33. Cfr. Gustavo Gutierrez, *A Theology of Liberation*, London 1974 162-78, 203-208

34. GS nos. 34.35. 38.39; PP esp. nos. 43ff; Cfr. C. Illickamurý, *The Lordship of Jesus Christ*, 361-70.

It is also theologically misleading when the document says that "God and not man, has the power to, change the situations of suffering" (IV, 5) and that "it is only the Holy Spirit who has been given to us, who is the source of every true renewal and that God is the Lord of history" (XI, 9), without at the same time adding that God brings about this change and renewal through man and his history. God as the Transcendent Cause is certainly the source of all change and renewal, but the Transcendent Cause rather than excluding freedom, initiative and activity of man enables and impels him to act freely in order to achieve His purposes in history. God, precisely because He is the Transcendent or First Cause, always acts through secondary causes. He does not act like a "deus ex machina", immediately intervening and taking the place of the secondary causes.

Some of the other accusations of heresy raised against liberation theology seem to come from incomprehension of the real position of liberation theology. Such accusations are that liberation theology denies faith in the Incarnate Word, dead and risen for all men (X, 11), that it holds there is an opposition between "Jesus of history" and "Jesus of faith" (X, 8)³⁵, that it ignores sacramentality (X, 15), gives an exclusively political interpretation to the death of Christ (X, 12) etc. No serious liberation theologian will be able to see any of these accusations true in his regard. It is true that they try to give these truths of-faith a more relevant interpretation based on the gospel itself.

3 The question of the Marxist analysis of society

One of the most serious deviations of liberation theology, according to the document, is its method of analysis of society which is adopted from Marxism. It is true that liberation theologians really make use of the Marxist analysis of society, but they affirm that it is made use of only as a tool for understanding the societal reality

35. It is true that liberation theologians start with the historical Jesus and pay close attention to his life and praxis, but that, as Jon Sobrino says, is to understand better the universality of Christ.

in the service of faith and theology ³⁶. The document accepts the need of the "scientific knowledge of the situation and of the possible strategies for the transformation of society" (VII, 3), but it holds that it is impossible to adopt the Marxist analysis of society without accepting also its entire ideology (VII, 4-13). It is undeniable that Marxism as propounded by Karl Marx and by other leading exponents is essentially atheistic, and as such irreconcilable with Christian faith. Not to be reconciled are also this-worldly messianism of Marxism and the eschatological hope of the Christians. Man (or humanity) according to Marx, is his own creator and his own redeemer. There is no place in Marxism for any supernatural redeemer. But as Walter Kasper, who is also a member of the International Theological Commission, has pointed out ³⁷, one has to distinguish between the Marxist analysis of the social problems and its ideological interpretations. "Even if one formulates fundamental theological objections against the ideological interpretation of Marxism", Kasper continues, "one need not deny that it has developed important *instruments which have become indispensable* in the meantime to analyse social, economical and political problems. These methods become ideological only when they are made absolute, i. e., when religious phenomena are a priori analysed and discussed only in socio-economic perspective and no more in themselves. To this advantage of method is added also the contribution of Marxism in contents: *the hint about the fundamental meaning of work*. The encyclical 'Laborem Exercens' (1981) has adopted this aspect from a Christian perspective, and considering work as a basic form of human self-realization, has deduced from it the primacy of the working person before things and therefore also before capital" ³⁸.

The International Theological Commission in its document on the theology of liberation was not averse to

36. Cfr, Vaidikamitram March 1985, 84-88

37. Walter Kasper, *Der Gott Jesu Christi*, Mainz 1982, 56

38. *Ibid.* (tr.:C. I.; Italics: Kasper)

the adoption of the Marxist analysis for the study of society. It said that a theologian cannot deduce from his theological principles political maxims and criteria for social analysis. These he has to borrow from the social sciences. He has only to remember the limits and dangers connected with them. When Marxian theories and analyses are used, the document said, one must remember that the use made of them by theology does not give them a higher truth-value³⁹. The basic interpretation underlying their use and application must always be Christian and not Marxist⁴⁰. Even Pope Pius XI in his encyclical "Quadragesimo Anno" (1931) had in essential points touched the Marxian analysis and the Marxian criticism of capitalism. This trend we find practically in all the following social encyclicals even in "Laborem Exercens" of Pope John Paul II. The use of the Marxist analysis for the study of society, therefore, does not seem to be so inseparable from Marxist ideology nor so incompatible with the Christian faith, as the document would have us believe⁴¹. The Marxist analysis has actually undergone a great transformation in the hands of the liberation theologians of Latin America that Marx and the Marxists themselves might hardly recognize it⁴².

4. The question of violence

The question of violence is another sore point about the theology of liberation, according to the document. The affirmation of class struggle by liberation theology implies also its stance that society is founded on violence and hence it affirms the necessity of violence (VIII, 6-7). "To the violence which constitutes the relationship of the do-

39. Zum Verhältnis (no. 6 above), 180

40. Cfr. Vaidikamitram March 1985, 76f.

41. Errol D'Lima, S. J., Instruction on Certain Aspects of the "Theology of Liberation": a Theological Reflection, in: Vidyajyoti 49 (1985) 364-76, 365-72

42. Cfr. Raul Fornet-Betancourt, Der Marxismusvorwurf gegen die lateinamerikanische Theologie der Befreiung, in: Stimmen der Zeit, April 1985, 231-40

mination of the rich over the poor, there corresponds the counter-violence of the revolution, by means of which this domination will be reversed" (VIII, 6). These statements of the document give the impression that liberation theologians advocate the use of force and violence in order that the rich and the oppressors of today may be turned into the poor and the oppressed of tomorrow. This does not agree at all with the reality. The fact is that the vast majority of Christians, whether bishops, priests or laity, who have made their option for the poor and who consider it their bounden duty coming from the gospel to exercise criticism of the structures of injustice and oppression in Latin America and who consequently are suffering arrest, torture and persecution, profess and practice non-violence⁴³. It is true that liberation theologians focus attention on the repressive violence against the vast majority that already exists in Latin America as a reality and that has been institutionalized to the advantage of a small, privileged minority of the rich and the powerful. They hold that this violence should not continue. But how to bring about an end to this violence? Some like Enrique Dussel speak of a "prophetic" or "pedagogic" violence, that is, the violence of the Word as exemplified in the prophets of the Old Testament as well as in the prophets of our age like Helder Camara and archbishop Oscar Romero, and of course, in Jesus himself⁴⁴. Others like Gustavo Gutierrez seem to approve the use of what they call "liberative violence" to oppose the institutionalized and repressive violence that is already a reality.

This position does not seem to differ substantially from that which has already been both in the teaching and in the practice of the Church. Pius XI in his encyclical "Firmissimam Constantiam" (28-3-1937) has expressly ack-

43. Peter Hunermann, *Lateinamerikanische Staatsklasse*, 478

44. Cfr. Enrique Dussel, *A History of the Church in Latin America Colonialism to Liberation* (ET: Grand Rapids, Eerdmans, 1981) 173ff, quoted by J. Kottukapally, *Liberation Theology and Marxism*, 360

nowledged the legitimacy of applying physical violence, if the situation in a land or a society is so unjust and opposed to human fundamental rights. Paul VI also in his encyclical "Populorum Progressio" acknowledges the right of a people for revolution when the state is seriously corrupt (nos. 30 and 31).

5 A few general observations

One cannot easily avoid the impression that the document assumes a tone of polemics reminiscent of the Counter-Reformation days and manifesting little of the spirit of the Second Vatican Council. It seems to draw out of context and to exaggerate unduly the positions it attacks. Often it gives the impression of fighting phantoms, attacking positions and views which nobody holds. Maybe it is a warning that one may not adopt them in future. There seems to be an unhealthy fear of Marxism which has unduly influenced the document. Though the Church, especially after Vatican II, has accepted the principle of a legitimate pluralism in theology, the document does not show any sympathy for this principle. For it theology is what has been developed in Europe at a particular epoch. This it considers as valid everywhere and always. A similar European centred thinking is evident also in a number of instances. For example, it judges negatively only a certain type of colonialism (1, 8), speaks nothing against capitalism which was sharply criticized by Pope Paul VI in "Populorum Progressio" (no. 26). has nothing to say against economic colonialism or the unfair trade conditions imposed on the poor nations, etc., while Communist dictatorships are declared to be the "shame of our time" (XI, 10). After describing the existing situation of oppression, violence and the denial of human rights in Latin America, the document is only concerned about the possible counter-violence that this may spark off and a "pathos" which borrows its language from Marxism (VII, 12).

Card. Ratzinger's personal theological and ecclesiological convictions may help us better understand and

evaluate the present document. Ratzinger loves the Church with a deep and ardent love. He seems to be convinced that over the last twenty years a "progressive process of decadence" has developed in the Church under the slogan of the so-called spirit of the Council, as he himself says in his book "Report on the Faith", published in Italy on 30th May, 1985⁴⁵. The post-conciliar stances and theological writings of Ratzinger who was considered a progressive theologian till the end of the Council, bear witness to this anguish of his soul. That explains also his parting of ways with other progressive Catholic theologians like Karl Rahner, E. Schillebeeckx, Walter Kasper, J. B. Metz, and others soon after the Council. He was one of the leading personalities behind the founding and publication of the conservative theological review *Communio* conceived as a sort of counter-balance to the progressive international theological review *Concilium*. Against this background we must see also the stance he has adopted with regard to the theology of liberation, which he sincerely believes is a danger to the Church and its (traditional) theology. One need not feel so bad about it, since Pope John Paul II himself has said that the statement of Ratzinger about the "progressive process of decadence" confronted by the Church over the last twenty years is Ratzinger's "own opinion", and that it cannot be understood to mean that the Second Vatican Council was a negative influence or a negative meaning for the Church⁴⁶.

What causes concern, however, is the founded suspicion that matters other than theological, ecclesiological or Latin American have exerted influence over the document without its authors themselves being aware of it⁴⁷. Those who are familiar with the ways of world politics today know how agents of vested interests can insidiously creep even into the spheres of Church and theology to

45) Cfr. Examiner, July 13, 1985

46) Cfr. Examiner, Sept. 14, 1985, 852

47) G. Burchardt, Rom urteilt, 480

get through their plans in subtle ways. This suspicion becomes all the more hardened when one recalls documents like the Rockefeller Report (1969) which described the Church in Latin America as a threat to American investments⁴⁸. The quick spread of the theology of liberation from Latin America to other lands and continents where too efforts are being made to develop a theology of liberation of their own, has certainly been an influencing factor. The ecclesiastical and political developments in Nicaragua seems to have also played a role. In the face of all these one has to ask if the congregation has not unwittingly played itself into the hands of those who seek neither the growth of God's kingdom nor the good of the Church.

In conclusion, let us hope that the document on liberation theology that the Congregation of Faith has proposed to publish later will be one that really makes its option for the poor. If the coming document takes up and emphasizes the more positive aspects of a genuine theology of liberation as is promised, not limiting itself to one particular school of theology but taking into confidence and dialogue representative theologians from the whole Church, and also Latin American bishops and theologians of liberation as Cardinals Aloisio Lorscheider and Paulo Evaristo Arns have expressly requested⁴⁹, then it will really be a sign of hope for the Church and the world.

Cyprian Illickamury

48) Cfr. the publication of the Department of State Bulletin, on 8th December 1969, "Quality of Life in the Americas - Report of a Presidential Mission for the Western Hemisphere", p. 18 (quoted by John Eggleston and Philip Scharper, *Puebla and Beyond*), New York 1979, 26 (footnote 27)

49) G. Burghardt, *Rom urteilt*, 485

Roman Document on the Theology of Liberation - a pastoral assessment

Instruction on certain aspects of the "Theology of Liberation" issued by the Sacred Congregation for the Doctrine of the Faith (CDF) has triggered a lively discussion not only among professional theologians but also among pastors and lay people all over the world. In India there were special seminars and study classes conducted for Priests, religious and lay people. Here one could notice a crystallization of two schools of thought apparently opposed to each other. For fear of being "brain-washed" by one group there were rival seminars and study classes in various parts of the country. There are individuals and groups who feel a sense of satisfaction and say that, at last, the official Church has taken certain firm steps to curb the uncontrolled spread of "leftist thinking" in the Church and thus saved the Church from an impending collapse. On the other hand there are others who feel that the Sacred Congregation has failed to understand the true nature and purpose of liberation theology and thus has not done full justice to it in the aforesaid Instruction. Now that the time of the immediate reactions with its emotionally charged attitudes is over, it will be worth while to assess the CDF Instruction from various angles. This article is a modest attempt to study it from the point of view of pastoral theology. Such a study is important in so far as the principal thrust of liberation theology is pastoral and at the same time the CDF Instruction can be assumed as the result of a deep pastoral concern of the Church.

I. New trends in Pastoral Theology

In the new vision of pastoral theology there are two main points to be considered. First of all it must be

clear to us that the salvific activity of Christ, now mediated by the Church, is not carried out only through individual priests but through the life and activity of each and every member of the ecclesial community, of course, each playing one's particular role in the Church. Thus a priest has a particular role and a lay person has another role in the Church. The pastoral mission of the Church, however, will be fulfilled only through the corporate activity of the whole body at every level.

Secondly, the Church's mission cannot be limited to saving individual souls, as was considered in the past. Church has to impregnate and transform the human society as a whole through the saving grace of Christ. This imposes on her the duty to analyse the conditions of a given time in which the human society finds itself, and to decide in the light of faith, what she ought to do in order to help the human society to realize its aspirations for its fulfilment in Christ¹.

Now the Church in her ultimate essential nature is the event of God's gracious nearness to man. It is an event that has to be expressed as truth and act of love. As an event Church cannot be something static, but it has to be a dynamic force. Consequently, the actual, concrete situation of man with its social, cultural, economic, and political aspects plays an important role in the self-realization of the Church. It is within the context of these situations and conditions of life of the people that the Church has to realize herself. She has to be the sign and instrument of man's communion with God and unity and solidarity among men. This would mean that being a member of the Church is to be fully aware of one's own dignity as a human being and one's equality with every one else. One is aware of one's own dignity and equality when one is acknowledged and accepted as a person; when one's legitimate aspirations are fulfilled; when one's right to truth is granted; and when one's personal freedom

1. Cerege V. Lobo, *Moral and Pastoral Questions*, Gujarat Sahitya Prakash, 1984, 56-57.

is guaranteed. Above all it is necessary that man's basic needs are met.

But where the social, cultural, economic and political conditions do not permit a vast majority of the people to be concretely aware of their human dignity and equality, there the Church cannot actualize herself fully. Then it becomes a serious duty on the part of the Church, in order to be herself, to make use of all the means at her disposal to try to create conditions in which not even a single person will be prevented from experiencing his or her dignity and equality. Where human beings are denied even the basic necessities of life, where they are reduced to the level of animals and forced to live in subhuman conditions, the Church cannot think of actualizing herself, of being present to those people, except by focusing its attention on liberating every man and the whole man in all his relationships. This task draws the Church naturally to activities which are intended to promote social justice, radically to transform the existing unjust and stifling social structures.

The Church has in recent times fully realized this vital link between her pastoral duties and social engagements. The Second Synod of Bishops in 1971 speaks of it in unmistakable terms when it declares; "The present situation of the world, seen in the light of faith, calls us back to the very essence of the Christian message, creating in us a deep awareness of its true meaning and of its urgent demands. The mission of preaching the Gospel dictates, at the present time, that we should dedicate ourselves to the liberation of man even in his present existence in this world. For unless the Christian message of love and justice shows its effectiveness through action in the cause of justice in the world, it will only with difficulty gain credibility with the men of our times."²

2. Justice in the World, Nr, 35, Cf. J. Gremillion, The Gospel of Peace and Justice. Catholic Social Teaching since Pope John, New York, Orbis Books, 1976, pp. 520-521.

2. Pastoral theology in the Latin American context

In the above reflections we have seen that the new trends in pastoral theology have given rise to a new dimension to Church's pastoral activities. It is against this background that we will have to look at the origin and development of liberation theology. It is also significant that the theology of liberation has its beginning in the grassroot or basic Christian communities in Latin America. It was the manifestation of a new vitality of faith among the people of this subcontinent. In the words of Leonardo Boff, liberation theology is nothing but the "articulate cry of the poor out of their faith". It is born out of the reflection of Christians who are committed to the cause of the Gospel in the midst of the poor and the simple people.

Setting up of a permanent episcopal organization for consultation, study and action in Latin America (Consejo Episcopal Latino Americano — CELAM) in 1955 also contributed very much for the development of liberation theology. This council's most effective role has been the interpretation for Latin America of certain recent key social Encyclicals. The bringing together of the concerns of Vatican Second and a fresh socio-political and economic analysis of Latin America in the documents of Medellin (1968), became a significant catalyst for the theology of liberation movement³. In the Latin American situation pastoral theology assumed the name "liberation theology". It is an effort of the Latin American Church to realize herself in its concrete situation. Since it is a matter of existential ecclesiology the liberation theologians give greater emphasis to "orthopraxis" than to "orthodoxy".

The pastoral concern that is inherent in the origin and development of liberation theology can be gathered from the CELAM Document issued at Medellin. In the first section of the Document, dealing with justice the bishops reaffirm the views expressed in *Gaudium et Spes*

3. J. Andrew Kirk, *Liberation Theology*, London, Marshall, Morgan & Scott, 1979, p. 16.

(39, 64) and declare that the very same God who creates human beings in his own image and likeness, creates the earth and all that is in it for the use of all men and all nations in such a way that created goods can reach all in a more just manner and gives them power to transform and perfect the world in solidarity. This original plan of creation has been perfected in the Incarnation of the Son of God ⁴. Consequently the Church, as the sacrament of Christ has to continue perfecting this original plan of creation in a given time and space. This task is an essential element in the Church's concrete existence itself. Therefore the bishops say that the Church will lend its support to the down-trodden of every social class so that they might come to know their rights and how to make use of them ⁵. In the section "Peace" of the same Document the bishops are more explicit in stating their responsibility to social involvement as pastors. As pastors of the Church the bishops consider it their duty to educate the Christian conscience, to inspire, stimulate, and help orient all the initiatives which contribute to the formation of man. It is also part of their duty to denounce everything which, opposing justice, destroys peace. This very same concern is reflected also in the pastoral guidelines given by the bishops to maintain and foster peace ⁶.

Speaking to the Germans in the Beethovenhall, Bonn, Cardinal Paulo Evaristo Arns, Archbishop of Sao Paulo, Brazil said last year that the Church must belong to the people and should be with the people, especially when the people suffer. Man needs man, otherwise God would not have become man. The cardinal also reported that in his diocese there was no division between the basic communities, the seed-bed of liberation theology, and the bishops. The bishops and the priests listened to the impulses given by the people. The faithful also co-operated

4. Medellin Documents, Art 3, Cf. J. Gremillion, op. cit. p, 446.

5. *Ibid*, Art. 20,

6. *Ibid*. "Peace", Art. 20-33, J. Gremillion, op. cit., pp. 462-463.

in setting the goal of the care of souls. Thus the hierarchy and laity, the entire Church worked together to make the Church a concrete event through various pastoral engagements, including those which are envisaged in liberation theology⁷.

3. New notes in the Church's Social Teaching

From the time of *Rerum Novarum* of pope Leo XIII Catholic social Teaching has always repudiated class struggle. The reasons are that class struggle sought the victory of one class over another instead of a new mode of co-operation; it was nourished by resentment against the powerful instead of Christian love of neighbour; it easily led to violence and engendered new forms of domination; and finally it was often associated with an ideology which made class struggle the dynamic principle of history moving society toward the overcoming of its contradictions⁸. The Second Vatican Council still upheld this traditional teaching even though its vision of society was more democratic and pluralistic.

The Latin American Bishops Conference at Medellin, however, added a new note in the Catholic social teaching. According to Medellin Document the presentday society is in a conflictual situation. The section of the Medellin Document entitled *Peace* speaks of the Latin American societies as caught up in tensions that conspire against peace. The tensions are divided into three major groups. The first major group of tensions is recognized as the tensions between classes and International colonialism. There are various forms of marginality in the society based on socio-economic, cultural, political, racial and religious realities which divide people. Extreme inequality among social classes is one of the major factors which contribute towards tensions in the country. Decisions con-

7. Kirche und Leben (A Weekly of the Diocese of Munster, West Germany) Nr. 39, 23. September 1984, p. 3.

8. G. Baum, Class Struggle and the Magisterium: A New Note, in: Theological Studies, 45 (1984) 690.

cerning the Latin American societies are made by multinational corporations with head offices in the wealthier nations. A small group of Latin American citizens who are closely associated with these multinational corporations form a colony of the richer class within the poor countries. They often are very powerful political actors and control the political and economic destiny of the states. Their main concern is to maintain the status quo, despite the grave injustices it involves. Thus, according to the Document, Latin America is caught in the sway of "internal" and "external" neo-colonialism. In other words, the societies are conflictual realities and so there is no meaning in talking about them in organic terms ⁹.

Another point emphasized by Medellin document is the pressing need for institutional change. The bishops are quite clear in their view that the call for personal conversion and greater individual virtue is wholly inadequate unless it is accompanied by an equal emphasis on structural changes. According to them what has to change in Latin America is both structure and consciousness. Medellin called this double aim of structural change and new consciousness "Liberation" ¹⁰. Here the bishops were giving an official recognition to the perspective previously worked out by the basic Christian communities in Latin America, often supported and aided by theologians.

Medellin also recognized that the people's participation in the struggle for greater justice was an integral part of authentic christian living. We read in the Document: "Love, 'the fundamental law of human perfection, and therefore of the transformation of the world', is not only the greatest commandment of the Lord; it is also the dynamism which ought to motivate christians to realize justice in the world having truth as a foundation and liberty as their sign" ¹¹. Formerly a Christian's involvement in establishing social justice was understood as

9. Medellin, "Peace", Nr. 2-13, cf. J. Gremillion, *op. cit.*, p 455-458.

10. Ibid, "Justice", Nr. 3, cf. G. Baum, *loc. cit.*, p 691.

11. Ibid. Nr. 4, J. Gremillion, *op. cit.*, P 447.

based on the natural virtue of justice, but in the Medellin document it was a contemporary form of christian discipleship.

Conscientization of the masses of ordinary people is another point that is emphasized by the Medellin Document. It was the task of the Church, from a pastoral point of view to make the people aware of the obstacles that prevented them from being responsible for their own lives. The ordinary masses of the people should be made conscious of the fact that God has called them to be subjects of their own history. Here we find a clear change in the teaching of the Church. In the past, Catholic social teaching, even though it recognized the harm done to people by unjust structures, directed its appeals for social reconstruction to the powerful, the leaders, to the government. They were seen as the agents of reform in the society. With its stress on conscientizing the masses Medellin addresses the ordinary people, the poor and the oppressed, the victims of exploitation, as the principal agents of social transformation. That is to say, justice would be established only as the result of liberation struggle by the broad masses of the people themselves¹². The conflictual view of modern society was later strongly affirmed by the CELAM conference at Puebla in 1979. It called upon the whole Church to the "preferential option for the poor with a view to their integral liberation"¹³. The new notes in the Catholic Social teaching introduced by the Latin American Bishops Conference were soon accepted by the universal Church, by several national hierarchies and eventually by pope John Paul II. The Second Synod of bishops held in Rome in the year 1971 endorsed the conflictual understanding of modern society when it declared: "Even though it is not for us to elaborate a very profound analysis of the situation of the world, we have nevertheless been able to perceive the serious

12. Medellin, "Justice", Nr. 17-20. G. Baum, loc. cit. 691-692:

13 Puebla Document, Nr. 1134, cf. Stimmen der Weltkirche, Nr. 8, Bonn 1979, P. 193.

injustices which are building around the world of men a network of domination, oppression and abuses which stifle freedom and which keep the greater part of humanity from sharing in the building up and enjoyment of a more just and more fraternal world." The bishops further note that there is a new awareness among the people which shakes them out of any fatalistic resignation and which spurs them on to liberate themselves and to be responsible for their own destiny¹⁴. Pope John Paul II in his address at Favela dos Algodos, near Salvador de Bahia, Brazil, agreed that the society finds itself in conflict. He told the masses that they themselves were the agents of social change, that they should be actively involved in shaping their future. He also appealed to all who love justice to be in solidarity with the masses in their struggle for liberation. The pope said: "God grant that there may be many of us to offer you unselfish co-operation in order that you may free yourselves from everything that enslaves you, with full respect for what you are and for your right to be the prime author of your human advancement¹⁵."

This position was developed in a formal manner in the encyclical of Pope John Paul II, *Laborem Exercens*. The pope sees the dynamic element of modern society in the labour movement. According to him workers are the principal agents of the struggle for justice. The entire Church must be in solidarity with the workers' struggle for justice. Delineating the main development of the documents of the supreme Magisterium of the Church the pope says that while in the past the "class" question was especially highlighted as the central issue, in more recent times it is the world question that is emphasized. Thus, not only the sphere of class is taken into consideration but also the world sphere of inequality and injustice, and as a consequence, not only the class dimension but also the world dimension of the tasks involved in the path towards the achievement of justice in the modern world. The pope in-

14. Justice in the World, Nr. 3-4.

15. Here cited by G. Baum, op. cit. p 695.

sists that the unjust structures be never concealed but they be examined and transformed on a more universal scale¹⁶.

4. The CDF Instruction and the Theology of Liberation

As we have already seen above the new notes in the Catholic social teaching introduced by the Medellin documents and the subsequent ecclesiastical reception of these ideas have considerably helped the theology of liberation to chart its course of reflection and action. The pastoral concern of the Church urged the theologians of liberation to turn their attention to a new methodological approach to the concrete problems of a world radically divided between the rich and the poor. The theologians of liberation were fully aware of the conflicts and tensions that existed in the society, since they were no arm-chair-theoreticians but people who were living with the exploited and degraded masses. According to J. Andrew Kirk, neither the social encyclicals of the Church nor the Medellin and other Latin American ecclesiastical documents would have had the influence they did have on the early development of the theology of liberation, were it not for the fact that they reflected certain atrocious situations of poverty throughout the continent, situations which had been personally experienced by various priests and laymen¹⁷.

The various oppressive mechanisms that were at work in the Latin American society were laid bare by eminent sociologists and economists. They analysed the society in its various levels and questioned the concept of underdevelopment elaborated in the northern hemisphere and began to use Marxist categories to explain the reasons behind Latin American poverty and stagnation. They came to the conclusion that poverty was the direct result of exploitation; for dividends on investments and high interest loans from the rich nations removed far more capital from the sub-continent than was given as aid. It is this interpretation of Latin American situation which has most

16. *Laborem Exercens*, Nr. 2

17. J. Andrew Kirk, *op. cit.*, p. 24

influenced the origin and development of the theology of liberation. When the theologians of liberation use concepts such as "praxis", "reality", etc., they mean the social, economic and political situation as this is analysed by means of Marxist or neo-Marxist sociological tools¹⁸. Consequently the theologians of liberation speak of class-struggle. G. Gutierrez says: "The class-struggle is one of the cardinal problems of the world today which challenge the life and reflection of the Christian community and which can no longer be avoided."¹⁹

Denial of the existence of the class-struggle in the Latin American society is to play the role of false prophets. The Brazilian episcopate has clearly stated that it is impossible for them to be the false prophets who say that all is well while in fact all is going badly. The pastors could not close their eyes to the fact that the class-struggle has become a part of the Latin American economic, social, political, cultural and religious reality. So the Brazilian bishops said in a circular letter: "As pastors we are challenged to be continually faithful to man in the context of history. We are servants and ministers of liberation: 'when Christ freed us, he meant us to remain free' " (Gal. 5:1)²⁰. The bishops admit that a mere scientific analysis of the situation is insufficient and it should be followed by corresponding action. "We cannot rest satisfied with a mere scientific analysis of the situation. By his example Christ taught us to live what we announce. He preached brotherhood among men, love that must animate all social structures, above all he has lived his own message of liberation by taking on himself its full consequences. The powerful saw in his message and in his love a threat to their economic, social, political and religious interests and so they condemned him to death. But his spirit is at work today as yesterday, is giving an im-

18. *Ibid.* pp. 25-26

19. G. Gutierrez, *A Theology of Liberation*, London, SCM Press, 1974, P. 273

20. Circular letter of the Bishops of Brazil, 1968, Extracts reprinted by the Indian Social Institute, Bangalore, "I have heard the cries of my People", p. 2

petus to history and manifests Himself in the solidarity of those who struggle for freedom in union with the oppressed brothers."²¹ The deplorable economic, social, cultural and political situation of Latin American states is, according to the Brazilian bishops, one of institutionalized violence. This is the result of planning by man; and it is inevitably leading towards a class conflict²². This awareness of the inevitability of a class conflict is shared by almost all the theologians of liberation and the local Churches of Latin America.

To "advocate" class struggle is, according to G. Gutierrez, to reject a situation in which there are the oppressed and oppressors. It is to recognize that the fact exists and that it profoundly divides men, in order to be able to attack it at its roots and thus create the conditions of an authentic human community. Building a just society today necessarily demands the active and conscious participation in the class struggle that is occurring before our eyes. At the same time it must not be forgotten that the denial of the fact of class struggle is really to put oneself on the side of the dominant sectors. Here it is not a question of admitting or denying a fact which confronts us; rather it is a question of which side we are on. So when the Church rejects the class struggle, it is objectively operating as a part of the prevailing system. By denying the existence of social division this system seeks to perpetuate this division on which are based the privileges of its beneficiaries. It is a classist option, deceitfully camouflaged by a purported equality before the law²³.

It is true that the Gospel announces the love of God for all people and calls us to love as he loves. But to accept class struggle means to decide for some people and against others. The solidarity with the one and confrontation with the other should, however, proceed from the same source, namely, Christian love. This universality of Christian love is only an abstraction unless it becomes

21. *Ibid.*, p. 6

22. *Ibid.* p. 7

23. G. Gutierrez, *op. cit.*, pp. 274-275

concrete history. It has to be realized in particular instances. To love all men does not mean avoiding confrontations. It does not exist in a fictitious harmony either. Universal love is that which in solidarity with the oppressed aims at liberating also the oppressors from their own power, ambitions and selfishness.

To be fully human, man has to be in loving relationship with his fellow men. Oppression and exploitation of one's fellow men do not go hand in hand with genuine love for them. So any effort made to liberate them from their inhuman condition as the oppressed, is to make them really human. In other words, those liberating efforts are in fact concrete expressions of brotherly love. G. Gutierrez says that our love is not authentic if it does not take the path of class solidarity and class struggle. To participate in class struggle, according to him, is not only not opposed to universal love, but is today the necessary and inescapable means of making this love concrete²⁴. The only thing one has to take care is not to allow the combating of class division to drift into class hatred. If the oppressed class through their struggle is trying to become the oppressors, the class division continues, which, in turn, generates further struggle and class hatred.

Such a fear is manifest in the CDF Instruction under consideration. Section VIII accuses the "theologians of liberation" of subverting the meaning of truth and violence. First of all the Instruction does not make clear which theology of liberation it is accusing.

The CDF Instruction is right when it says that in the theologies of liberation class struggle is presented as an objective, necessary law²⁵. The liberation theologians who constantly rub their shoulders with the oppressed masses are fully aware that the society is divided into mutually opposing classes. They also perceive that such a division is man-made and consequently it can and should be eradicated. Once the fact of class struggle is accepted the

24. G. Gutierrez, op. cit., p. 276

25. *Ibid* art. 7

next step is to get rid of it. It would be truly unchristian to ask the people who are being systematically oppressed and forced to live in sub-human conditions, not to struggle to gain their rights, not to confront the evil for fear of violence²⁶.

The Instruction's understanding of violence seems to be very limited. It looks as though the Instruction is aware only of the violence of the oppressed in confrontation with the oppressors. But violence is not to be confined to this area alone. In an address to the British Parliamentarians on 26th June 1972 Dom Helder Camara, the bishop of Olinda and Recife in North-East Brazil and known as the "Voice of the voiceless", spoke of a spiral of violence. According to him the primary violence is the violence of injustice which is not limited to any particular nation. Millions and millions of adults and children who are deprived of their basic needs, who become blind and are condemned to die in utter misery, are the victims of this violence. Since it is not resulting in blood-shed it can be called the "white violence". It does not allow the blood cells to be formed in the body! So, in effect, it is no less violent than the drainage of blood! The revolutionary violence of the oppressed is only a reaction to the primary violence and hence it is called the secondary violence. This violence calls forth a third violence which is from the part of the government. Under the plea of law and order they suppress the insurgence and confrontations of the oppressed which in turn, makes the oppressed all the more violent. Thus the spiral of violence is accelerated²⁷. In such a situation it is not fair to condemn the secondary violence more vehemently than the primary one. The pastoral concern should prompt one to eradicate the primary violence which, in turn, will naturally make secondary violence cease or, at least, weaken.

26. Errol D'Lima, *Instruction on Certain Aspects of the "Theology of Liberation"* a theological reflection, in: *Vidyajyoti*, XLIX (1985), 364-376 here, 369

27. Dom Helder Camara, *Hunger und Durst nach Gerechtigkeit*, Graz 1973, p. 71

According to the CDF Instruction, liberation theology risks distorting the Christian message by reduction. It becomes reductive when it reveals "a tendency to identify the kingdom of God and its growth with the human liberation movement and to make history itself the subject of its own development, as a process of the self-redemption of man by means of the class struggle"²⁸. The Instruction also points out that, by the very fact, the "theologies of liberation" go on to a disastrous confusion between the poor of the scripture and the proletariat of Marx²⁹ their reductive tendency becomes obvious.

Liberation theology understands its task as prophetic-critical, that is, a critical theory of and for the Christian faith. In performing this task it functions as a critical theory which precedes and promotes the praxis of faith, but the praxis it promotes is the praxis of liberating self-reflection on the part of the Christian community, or what Gutierrez and Segundo, following Paulo Freire, characterize, "conscientization". This prophetic-critical task of conscientization involves a process of enlightenment brought about by a prophetic annunciation of the good news of God's kingdom and a critical denunciation of every dehumanizing social condition which is contrary to the universal brotherhood, justice and peace of that kingdom. To announce the Gospel is to proclaim the present reality of God's love in the world and promote an awareness of the dignity of all human beings, who together are called to become active subjects of their own history and thus participate in the fulfilment of God's kingdom³⁰.

In Gutierrez's words the struggle for a just world in which there is no oppression, servitude or alienated work will signify the coming of the Kingdom. Because the King-

28. CDF Instruction, IX, Nr, 3

29. *Ibid*, Nr. 10

30. Joseph Kroger. Prophetic-critical and practical-strategic Tasks of Theology: Habermas and Liberation Theology, in: Theological Studies 46 (1985) 3-20, here, 17-18

dom and social injustices are incompatible (Is. 29: 18-19; Mt 11: 5). So the struggle for liberation is also a struggle for the Kingdom. The eschatological promises are being fulfilled throughout history, but this does not mean that they can be identified clearly and completely with one or another social reality. The complete encounter with the Lord will mark an end to history, but it will take place in history. Thus, according to Gutierrez, we must acknowledge historical events in all their concreteness and significance, but we are also led to permanent detachment. The encounter is present even now, dynamizing humanity's process of becoming and projecting it beyond man's hopes (I Cor 2: 6-9): it will not be planned or predesigned³¹. This, however, sounds like the view expressed in the pastoral Constitution *Gaudium et spes*, where it says "although we must be careful to distinguish earthly progress clearly from the increase of the kingdom of Christ, such progress is of vital concern to the kingdom of God, in so far as it can contribute to the better ordering of human society"³².

Gutierrez emphasises that temporal progress and the growth of the Kingdom both are directed towards complete communion of men with God and of men among themselves. They have the same goal, but they do not follow parallel roads, not even convergent ones. The growth of the Kingdom is a process which occurs historically in liberation, in so far as liberation means a greater fulfilment of man. Liberation is a precondition for the new society, but this is not all. While liberation is implemented in liberating historical events, it also denounces their limitations and ambiguities, proclaims their fulfilment, and impels them effectively to total communion. This is not an identification. Without liberating historical events, there would be no growth of the kingdom. But Gutierrez admits that any effort from the part of man will be ineffective to root out oppression and exploitation without the coming of

31. G. Gutierrez, op. cit. p. 168.

32. *Gaudium et spes*, Art. 39.

the kingdom, which is not the end result of man's efforts but a gift of God. He says: "We can say, that the historical, political liberating event is the growth of the kingdom and is a salvific event; but it is not the coming of the kingdom, not all of salvation."³³ This understanding of the relationship between the coming of the kingdom and the human liberation movement is a little bit different from what is imputed to "theologies of liberation"! By not making proper distinctions between the different trends in the theology of liberation the CDF Instruction casts doubts on its own intentions.

The CDF Instruction does not seem to have taken also the modern understanding of sin and conversion into account. It admits however that there is an acute need for radical reforms of the structures which conceal poverty and which are themselves forms of violence, but goes on to point out that the source of injustice is in the hearts of men. Therefore it is only by making an appeal to the moral potential of the person and to the constant need for interior conversion, that social change will be brought about which will truly be in the service of man³⁴. Here sin and conversion are considered from a purely individualistic sense. Today theologians speak of structural sins. A modern pastor of souls who is true to his vocation cannot but be aware of the sins that are inherent in the structures themselves. They cannot be imputed to the malice of any particular individual, but they are "inbuilt" in the structures themselves and liberation from these is not possible by the conversion of individuals but only by the change of such sinful structures.

G. Gutierrez says: "In the liberation approach sin is not considered as an individual, private or merely interior reality—asserted just enough to necessitate a 'spiritual' redemption which does not challenge the order in which we live. Sin is regarded as a social, historical fact, the absence of brotherhood and love in relationships among

33. G. Gutierrez, *op. cit.*, P. 177.

34. CDF Instruction, XI, Orientations, 8

men, and, therefore, an interior, personal fracture. When it is considered in this way, the collective dimensions of sin are rediscovered... Sin is evident in oppressive structures, in the exploitation of man by man, in the domination and slavery of peoples, races, and social classes. Sin appears, therefore, as the fundamental alienation, the root of a situation of injustice and exploitation³⁵.

The CDF Instruction, however, places sins and true liberation on the one side and the enslavements in the cultural, economic, social and political areas and liberation from these on the other. Sins and enslavements, liberation and liberations are seen mutually opposing. In section IV of the Instruction, dealing with the biblical foundations, it is said: "unquestionably it is to stress the radical character of the deliverance brought by Christ and offered to all, be they politically free or slaves, that the New Testament does not require some change in the political or social condition as a prerequisite for entrance into this freedom" (IV, 3). Still effort is made here to bring the freedom which Jesus gives and the social condition into some kind of relationship when it refers to the Letter to Philemon and acknowledges that the new freedom procured by the grace of Christ should necessarily have effects on the social level. But the consequence of this opposition (*Gegenüberstellung*), according to the Costa Rican theologian, Franz J. Hinkelammert, is the separation between faith and action, that is to say, the question of orthodoxy of faith is independent of the right or false action³⁶. The action does not become the true expression of the person's faith. Here it is a question of orthodoxy and orthopraxis.

G. Gutierrez is very clear when he explains what he means by orthopraxis. He says: "Faith in God who loves us and calls us to the gift of full communion with him and brotherhood among men not only is not foreign to the transformation of the world; it leads necessarily to

35. G. Gutierrez op.cit., p. 175

36. F. J. Hinkelammert, loc.cit., p. 62

the building up of that brotherhood and communion in history. Moreover, only by doing this truth will our faith be 'veri-fied', in the etymological sense of the word. From this notion has recently been derived the term orthopraxis, which still disturbs the sensitivities of some. The intention, however, is not to deny the meaning of orthodoxy, understood as a proclamation of and reflection on statements considered to be true. Rather, the goal is to balance and even to reject the primacy and almost exclusiveness which doctrine has enjoyed in Christian life and above all to modify the emphasis, often obsessive, upon the attainment of an orthodoxy which is often nothing more than fidelity to an obsolete tradition or a debatable interpretation."⁸⁷

That the Instruction itself shares this view is evident from what it says in another context. There we read: "Likewise the experience of those who work directly for evangelization and for the advancement of the poor and the oppressed is necessary for the doctrinal and pastoral reflection of the Church. In this sense, it is necessary to affirm that one becomes more aware of certain aspects of truth by starting with praxis, if by that one means pastoral praxis and social work which keeps its evangelical inspiration."⁸⁸

Conclusion

In the foregoing pages we have seen what is the present understanding of pastoral theology and how it is related to liberation theology, specially in the context of Latin America. We also reflected on the pastoral concern of the Sacred Congregation for the Doctrine of Faith in issuing the Instruction. One must admit that the new venture theology has entered into warrants certain cautions and the Sacred Congregation has the right and duty to remind all those who are concerned with it. In the exercise of its rights, I am afraid the Sacred Congregation has manifested an undue fear of Christian liberation struggle.

87. G. Gutierrez, *op. cit.*, p. 10.

88. Instruction, XI - Criteriums, 13.

gle being infested by Marxist ideology. This becomes quite understandable when one remembers that since the time of John XXIII popes have encouraged co-operation with people of other beliefs and ideologies for the achievements of economic, social, cultural and political ends, provided these ends are honourable and useful and they conform to right reason and are interpreters of the lawful aspiration of the human person. In his encyclical 'Pacem in terris' pope John XXIII leaves the decision regarding the mode and extend of co-operation to those who live and work in the specific sectors of human society. The Instruction, however, does not seem to have a positive word about the sincere efforts of those who are engaged in liberation movements!

A basic principle of modern pastoral theology is that Church's pastoral action is to be performed not from a pre-conceived principle but taking into account the concrete situation in which the Church has to realize herself. An openness to what is actually going on in the society is needed from the part of the pastors and also they must be able to perceive the good that is found there. By accusing the theology of liberation in general of serious deviation from the right path and by not acknowledging the positive elements in them the Instruction has not done a great service to the pastoral cause of the Third World Churches. The doctrines of liberation theology are unnecessarily presented as suspect, by which only their opponents are helped. Besides, the concepts of sin and conversion, of salvation, the relationship between orthodoxy and orthopraxis, etc., expounded in the Instruction are a bit outmoded theological positions and less helpful for facing the modern pastoral problems of the Church. Church can be pastorally effective only in so far as she is able to mediate God's gracious self-gift and nearness to man and the consequent community among men, which is rooted in truth, justice and love.

Instruction on Theology of Liberation - social dynamics

The 'Instruction' of the Roman Congregation for the Doctrine of Faith sets out to "draw attention of all the faithful to the deviations and risks of deviation damaging to the faith and Christian living that are brought about by certain forms of liberation theology"¹. But it ends up denouncing in effect, the whole of liberation theology movement now gathering strength in the third world disapproving not only some of its doctrinal positions ("deviations"), but its basic methodology and the analytical tools used by it. The positions that the document holds on the analysis of society, the root cause of social injustice, the relation between the temporal and the spiritual, the political dimension of the gospel, the relation between orthodoxy and orthopraxis and several theological and biblical themes like sin, freedom, salvation, exodus etc. are very different from or opposed to those of liberation theology. At the same time, it contains some highly positive remarks about it². Coming to particular issues, too, we can note contradictions. While implicitly approving critical use of Marxism as legitimate³, it prepares ground for attacking any, even critical, use of Marxism⁴. After having branded the contribution of "praxis" towards reflection in search of truth as *partisan* and hence as leading to a *subversion* of truth⁵, it acknowledges "action for the advancement of the poor" as necessary for "the doctrinal and pastoral reflection of the church"⁶.

1. *Instruction*, Introduction

2. Cf. Tablet Editorial, 8th September 1984; *Examiner*, Editorial, 15th September, 1984

3. *Instruction*, Introduction, VI: 10

4. *Ibid*, VII: 6,10, S. Kappen, Church, "liberation theology and Marxism," in *Coeli*, (Brussels, June 1985), p. 3

5. *Ibid*, VIII

6. *Ibid*, XI:13

We shall examine briefly the dynamics by which Church/Religion operates in a class society (I), then the strategy of the dominant classes and its impact on the document (II), next the dynamics of the institutional Church (III), and lastly the dynamics behind the emergence of liberation theology (IV), on which the document concentrates its attack.

I. Church / Religion is a class society

Preliminary observations

Church is a spiritual reality, and, as such, is of the order of faith. But it is also a social reality subject to social dynamics. As a social and historical reality church is functioning at present in a class society, i.e., a society made up of the dominant and the dominated, whose interests are mutually opposed. The opposition between these interests and its operation in the *normal* functioning of society constitute *class conflict*. Class conflict is not to be identified with armed struggle or bloodshed.

The conflictive structure of society makes demands on religion/church. This is on account of the fact that the followers of religion/church are set in this conflictive structure of society.

Social function of Religion

The function of religion in its intellectual components consists in the transformation of the *socially lived into the socially thought*⁷. This takes the form of a symbolic representation of the world, understandable and communicable, i.e., a world view. Religion shapes this world-view of its adherents with reference to the supernatural and the meta social. By this it gives meaning to, and orientates, the activity of the believing groups. In other words, religion defines for the social groups adhering to it the thinkable and the unthinkable, the possible and the impossible, the forbidden, the permitted and the obligatory,

7. Lopez Fernandez Francesco, *Sociedad, ideologia discurso religioso* - (Institute des Sciences Politiques et sociales / UCL, 1976) cited by Maduro, Otto, *Religion and Social Conflicts*, Orbis Books, Maryknoll New York, 1982, p. 116

and the absolute and the relative⁸. By so doing religion makes it possible for them to act upon nature and society. To the extent that the religious world-view is preponderant in a society, it will determine what activities are *possible* in that society. It will also *limit* and *orientate* these activities in a specific direction consistent with itself. This is how religion plays a role upon the development of society. The society and its development in turn influences religion too. This takes place through the dynamics of the mutual opposition of interests of the dominant and subordinate classes that constitute the religion's public⁹.

Dynamics of class society

This class conflict fixes the limit within which religion operates in society. This is due to the fact that every religious activity is carried out by individuals and groups who are situated in a specific position in the class structure of their society. It is also carried out in the presence of others who occupy a particular position in this class society. It is carried out also in the context of an unequal relationship of power between diverse classes. Thus the class conflict in a society permeates limits and orientates the action of a religion in that society inasmuch as it is the class position of the individuals or groups in that society that will dispose them to perceive reality in a manner which corresponds to their position¹⁰. This perception will be significantly opposed to that of other class positions in that very same society. This is on account of the difference in interest, expectation, needs, thought categories, behaviour patterns etc. between the diverse class positions¹¹.

The orientation imposed by the capitalist classes dominating the global society today can be identified in the doctrinal positions and biblical interpretations of the document. These represent an attempt to orientate and limit the practice of christians all over the world in a man-

8 See Mircea Eliade, *The Sacred and the Profane: The nature of religion*, New York, 1968

9 Madure Otto, *Religion and Social Conflicts*, pp. 115-117

10. *Ibid*, p. 67

11. *Ibid*, p. 67

ner that corresponds to the needs of capitalism. This function of the church is not necessarily part of a consciously thought out strategy. It is all the more effectual for its not being conscious.

Religion represented by liberation theology

It should be born in mind that no class society is totally free from resistance to domination, even though this resistance tends to take shape within the limits and orientations imposed by the dominant classes. Nevertheless, the dominated group imposes its own *limits* and *orientation* on activities arising within its own ambit. Religious activities within the dominated, however influenced they may be by dominant limits and orientations, will, therefore, be to some extent penetrated, limited and oriented by the dynamics of resistance. "A class resistance to domination will impose its own limits and orientation upon the reading, interpretation and official definition of the foundational message of any religion operating within subordinate classes."¹² This is why liberation theology, originating as it does in the dominated third world countries, has a character that is not approved by the Roman 'Instruction'.

2. Strategies of the dominant classes

The strategies used by the dominant classes to get religion to serve their interests may be classified under the following headings:

Economic strategies. The dominant classes will grant privileges and property to the clergy, especially to the highest ranks. By this it seeks to create links with them and makes them feel obligated to the dominant class and the social system in which they are dominant.

Family strategies. Bonds of affinity with the highest clergy are created by inviting them to bless marriages, to sponsor baptism etc. of their offsprings. By this the dominant class incorporates them into its life-style.

juridico-political strategies. The dominant classes bestow privileges on and create bonds with the clergy closest to

their interests and create legal mechanisms to stunt the growth of religious movements opposed to their interests. Concordats, patronages, concession agreements and other forms of mutual church/state recognition fall within this category.

Educational-cultural strategies: The dominant classes, who naturally favour the propagation of ideas favourable to their interest, try to incorporate the clergy into the process of their propagation, e.g., by giving the administration of cultural institutions, like schools, into their hands.

Repressive strategy: The dominant classes seek to penalize religious or anti-religious activities opposed to their interests by way of denigration, imprisonment and other forms of harassments. If these strategies successfully continue for a significant period of time, the result will be a deep mutual penetration, identification and feeling of obligation between the clergy and the dominant classes. Consequently, the religious activity of the clergy will *imperceptibly and unconsciously* fall in line with the class interest of the dominant groups and turn against the struggles of the dominated groups for liberation.

The "Instruction" of the Sacred Congregation is an eloquent witness to the efficiency of these strategies on a global scale. The church which at one stage was totally opposed to capitalism has, in her actual practice, come round to protecting its interest now that it has become dominant in the world.

Class characteristics of Religious Activity in favour of the Dominant Classes

- i) Status quo: - acceptance of the prevailing social, economic, juridical and cultural order as something beyond question; active solicitation for acceptance and defence of the established order.
- ii) Sacralization of dominance: — portrayal of the established order as the result of divine punishment or as the working of the divine providence; presentation of the dominated as persons who by way of punishment or providence ought to submissively accept their subordinate

condition; reference to those who hold power as depositories of sacred and eternal authority which ought to remain as it is and consequently must be obeyed under pain of divine punishment.

iii) Concealment of social conflicts:— Use of language innocuous and foreign to the basic conflicts of a class society; assignment of priority to struggle and conflicts far removed from the fundamental social conflicts and deflection of attention away from them; explicit denial of the existence or importance of social divisions between the dominating and the dominated.

iv) De-sacralization and de-legitimization: — Recognize the existence and importance of social division into classes but deny the legitimacy of a struggle against such division; recognize the legitimacy of a struggle against certain aspects of conflict — in matters of poverty, illiteracy etc. — but explicitly disqualify struggle against the existence of class division in society; non-production of teachings or activities that explicitly encourage struggle against the established order; explicit condemnation of the struggle of the dominated against structures of domination; explicit condemnation of the presence of unofficial representatives of the clergy in activities, processes, and institutions whose purpose is the expansion or commendation of struggles against the established order (unions, strikes, labour demonstration, political parties opposed to the class dominance, celebration of popular victories and so on); absence of the official representatives of the clergy in activities, processes and institutions of the type mentioned above.

v) Reformism: — Criticize the dominant classes for certain abuses but present them alone as capable of and authorized to correct these abuses¹³.

Class Dynamics operative in the "Instruction"

One of the chief accusations of the document is about liberation theology's acknowledgement of class

13. Maduro Otto, *Ibid*, pp. 122-128

struggle in society. The document openly attacks this stance of liberation theology¹⁴ and presents, instead, the theory of 'social stratification'¹⁵, that ignores and tries to conceal the reality of the existence of classes with mutually conflicting interests. The document finds this theory acceptable, for it is a theoretical construction acceptable to the bourgeoisie and is dynamically oriented towards the preservation of the *status quo*¹⁶.

The bourgeois idea of individualism is also accepted by the document. Any problem in society is to be traced back to the aberration of the individuals and not to structures of relationships¹⁷. Even oppression and exploitation are reduced to the lack of "social consciousness, corruption of officials, savage practices of dictators and some capital interests"¹⁸. The problem with the structure of domination and conflicts between classes are non-existent for the document. The suggestion of solution, too, serve the same purpose. From the structures, the document shifts the struggle for social justice to the inwardness of human heart¹⁹. The document sees persons only as individuals, and not as persons-in-structures. The struggle for social justice is then reduced to "appealing to the moral potential of the individual and to the constant need for interior conversion"²⁰. This individualistic and ethical approach to social problems de-sacralizes and de-legitimizes social struggles for justice.

Ideological identification with the dominant classes is the under current running throughout the "Instruction". "Authentic fight for justice", is, therefore, identified with "the fight for the rights of man". What is meant by this

14. *Instruction* VIII, X:2

15. *Ibid*, IX:2

16. Wielengo Bas, "The ideological Bias of the sacred congregation for the Doctrine of Faith", an unpublished paper.

17. Aloysius Amirtharaj et al, "A response from grass roots to Instruction on Theology of Liberation" mimeographed paper, p. 2

18. *Instruction*, VII:12

19. Sebastian Kappen, *Op. cit.*, p. 12

20. *Instruction*, XI:8 and others

expression is the justice of equal rights before law, of the basic freedom, and of human dignity²¹. Reformist measures which will rectify the abuses of the present systems and make it a bit more tolerable is all that the document recognizes as legitimate.

3. Dynamics of the Institutional Church

Class division of the "church's" public

Inasmuch as the "church's" massive and stratified public harbours internal conflict, the interest of the *church* in preserving its public will express itself in the production of unitive and ambiguous religious discourse. The function of this unitive character and ambiguous nature is to satisfy partially the contradictory demands of the conflicting social fractions, and thus to avoid a massive defection of any social class. For this reason, in a situation of social stability it is sociologically impossible for a "church" to engage in socio-politically side-taking religious discourse. By its unitive and ambiguous religious discourse, the "church" preserves the *status quo*, thus wittingly or unwittingly favouring the dominant classes. Here the interest of the "church" in preserving its public and the interest of the dominant classes in preserving the social order converge into a tightly knit and intimate nexus. This most often remains invisible to the religious agents and to their public.

The conservative influence of the "church" on the social order will all the more be efficacious to the extent it remains unnoticed (as in periods of stability). But in moment of hegemonic crisis, when autonomous social movements rise against the dominant classes, the conservative function of the "church" becomes visible as it engages in side-taking and univocal discourse against social movements opposing social domination²². This dynamics is operative behind the Roman document attacking liberation theology. The first part of the document with highly

21. Wielenga Bas, *Ibid*, p. 4 .

22. Maduro Otto, *Ibid*, pp. 133-134

approving observations on liberation theology and the contradictory character we noted at the beginning of this article are part of the technique of ambiguity of discourse. Here it must be added that the document is chiefly addressed to the third world countries especially in Latin America, where the Catholic Church still holds a very significant position in the areas of symbolic representation of the world. The concern of the document in regard to liberation theology is shared by the American State Department as well²³, which shows the depth of the mutual penetration between church and capitalism.

4. Dynamics behind the emergence of Liberation Theology

In a society where the world-view is preponderantly religious, it is practically impossible to undertake a struggle for the transformation of society without a change in the religious sphere. This change may be either antecedent or simultaneous with the struggle. Without it the subordinate classes will be unable to develop their class consciousness. They need a religious mediation in order to be able to situate and orientate themselves and act against domination. The religious innovation involved here should not constitute such a massive breach with the religious tradition of the subordinate classes that they react to the innovation with incomprehension and rejection. The religious innovation in question, therefore, should succeed in preserving a certain continuity with the traditions of those classes.

The anti-hegemonic trait of the new religious world-view should also involve a certain breach with the hegemonic religious tradition. Only then can the new religious world-view become an element of differentiation and opposition on the part of the subordinate classes with respect to the dominant ones. In other words a balance should be struck between continuity with tradition and breach with domi-

23. *The Rand Studies for the State Department and the Rockefeller Report on the Americas*, quoted in Maduro Otto, *ibid*, pp. xvi, xvii.

nation in order that the religious autonomy of the subordinate classes contribute to their struggle against domination. Liberation theology represents such a religious innovation especially in regard to the subordinate classes of Latin America.

The document alleges that liberation theology makes a break with the authentic christianity so as to de-legitimize it in the eyes of the "church's" public. Sociologically the factors that vouch for the "authenticity" of christianity have reference to i) history, ii) tradition, iii) teachings, iv) organization, v) position in the religious field, vi) internal social composition, vii) the public and viii) the resources of the church. Anything going against any of the above elements as commonly accepted is in danger of being rejected as anti-christian. By reason of this eventuality, these act as strong social forces drawing christianity in a specific direction and with specific intensity. The document tries to make out that liberation theology breaks with a number of these elements, or "deviates". To prove its point, it resorts to the strategy of misinterpretation.

Marxist "borrowings", class conception of society, concept of the use of violence, the understanding of the Eucharist, the kingdom of God, the relation between the sacred and the profane, salvation history and secular history, meaning of exodus etc. as found in liberation theology are misinterpreted as going against history, tradition, teaching etc. of authentic christianity ²⁴. For this, the document takes a theological position founded on Platonic assumptions.

The document represents an ideological offensive on the part of the dominant classes aimed at limiting and orientating the socio-natural activities of the subordinate classes, even though this may not have been the deliberate intention of the Sacred Congregation. From another perspective, it is the product of the conflict between the

24. *Instruction*, XI: 10, 11 etc.

foundational message of the church with all its original revolutionary thrust and the institutional orientation of the "church" which has a vested interest in the preservation of the *status quo*. It attacks liberation theology, not because it goes against the values of christianity, but because it does not correspond to the institutional interest, of the "church". It apparently had a measure of success, in some circles at least, from the point of view of slowing down the development of liberation theology movement in terms of the number of people subscribing to it. Yet, its chief effect has been of stirring up deep reflection both within and outside the church. In other words, qualitatively liberation theology has not only not suffered but positively gained on account of this document. The dominant classes cannot be expected to sit back and rest at this stage. One may not, therefore, be mistaken in looking forward with some apprehension upon how the special synod of Bishops, which is to take place shortly is going to react to the present situation.

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Struggle for Justice and Responsible Obedience

Introduction

In the Apostolic Letter of Pope Paul VI of May 14, 1971, we read: "Let each one examine himself, to see what he has done up to now, and what he ought to do. It is not enough to recall principles, state intentions, point to crying injustices and utter prophetic denunciations; these words will lack real weight unless they are accompanied for each individual by a livelier awareness of personal responsibility and by effective action." ¹ Speaking on justice in the world the Synod of Bishops of 1971 stated: "Action on behalf of justice and participation in the transformation of the world fully appear to us as a constitutive dimension of the preaching of the Gospel... The mission of preaching the Gospel dictates at the present time that we should dedicate ourselves to the liberation of man even in his present existence in this world. For unless the Christian message of love and justice shows its effectiveness through action in the cause of justice in the world, it will only with difficulty gain credibility with the men of our times."

In the January 1985 statement of the Conference of Religious of India, we have: "Through liberation we uphold Gospel values like freedom, fellowship and justice and thus work toward the creation of a new social order. Today, nobody who is concerned about the kingdom of God can afford to ignore this aspect of evangelization... Ministry of this nature is likely to result in uncertainties and anxieties, *frictions and conflicts*... Members of several congregations, with the approval of their superiors are already engaged in this ministry. We also affirm our support to them. This direction in ministry is bound to

generate a new type of theological reflection and of apostolic spirituality." ²

As the major superiors of religious have correctly noted, struggle for justice on behalf of the poor will result in conflicts with authorities, especially if the activists are priests or religious. Whereas the activists will look at their work as a struggle for justice with people, most of whom may not be Christians, the authorities are likely to look at it primarily as an ecclesiastical matter to be under their jurisdiction, despite the fact that the priest or religious activists may not be the decision-makers in this sort of activity. This situation calls for "a new type of theological reflection and apostolic spirituality" as the major superiors suggest. The present article is an attempt in this direction and purports to tackle the issue of responsible disobedience on the part of social activists in the face of prohibitions from ecclesiastical authorities. The topic being highly delicate and complex we can hardly provide explanations that are more than provisional and tentative. They are offered for further discussion and criticism.

Can there be justifiable exercises of responsible disobedience in the Church? It seems such acts, being morally licit and juridically tolerable, cannot be excluded. The term "responsible disobedience" is much more frequently used than clarified. It is applied, for instance, to practices which under analysis are neither precisely disobedient nor always responsible. Responsible disobedience is an act of disobeying specific general laws or precepts on moral grounds. It is going against a law or precept motivated by the actor's sense of moral indignation and duty. The activist chooses to disobey some law or command because he or she believes that it blocks justice being done to the poor. Such disobedience, though against particular Church law or authority, is practised within the unity of the Church and is intended ultimately for the betterment of the Church. It emerges as a moral exigency that discerns some impediment in the way of the Kingdom.

2. *In Christo*, 23 (April 1985) p. 103. Emphasis added

On closer examination the question of responsible disobedience appears to be one of obedience. The person is caught between obedience to the moral imperative of the Gospel and his conscience, demanding some action, and obedience to some canonical authority apparently thwarting that action. He is disobedient, but out of a higher obedience. He cannot change; the command must change.

Responsible disobedience is clearly different from the familiar disobedience of the ascetical treatises with its connotation of self-indulgence and egotism. Nor is it the same as a more modern kind of disobedience that does not tolerate any constraint or limitation of freedom. Responsible disobedience is a form of social behaviour directed to the change of the society. Precisely because this kind of disobedience is a form of change-oriented behaviour, the person's stance toward authority will depend not so much on personal moral qualities of pride or humility but on the judgment he makes on society and the need for change within that society. So it does little good, when a person has judged that a society or a church is in need of change, to call that person to obedience within that society. He is determined, not so much to obey or disobey, but to change that society.

A. Some prerequisites for disobedience to be responsible

I wish to discuss the question of responsible disobedience only in the context of certain prerequisites short of which such disobedience would hardly be responsible. Certain fundamental truths have to be grasped as background material for making a good decision regarding disobedience. The spiritual condition of the party concerned is of crucial importance in this regard. Those who undertake to disobey responsibly must, among other things, be prayerful, generally submissive to authorities and inspired by the Spirit of God.

a. Prayerfulness

Only a heart dominated by the Spirit of God in prayer can maintain equilibrium in the delicate area of responsible disobedience. Precisely because correct moral perception and correct moral willing are dependent on a good heart, a heart set on God and divine things, we are demanding intimate relationship with God as a prerequisite for acts of responsible disobedience. Activists who are serious about their prayer life can be expected to discern intuitively the correct behaviour in their struggle for justice. Virtuous persons, standing as they do in a particular relationship to God, have a particular stance or perspective which in turn affects their self-understanding, their perception and interpretation of the world. They possess certain internal norms whereby they discern what is right and good. Deep commitment to God in prayer orientates our hearts to God in such a way as to induce them to posit right actions.

b. Loyal submission to authority

Consecrated life has for its end the reliving of the Gospel way that Jesus Christ exhibited in his own personal conduct in regard to his heavenly Father. The obedience of Jesus was an act of worship of the same Father; it was not a means to develop, psychologically speaking, his natural personality. It was his father's glory, not his own "growth" that was its object, though both in fact converged. Priests and religious are not primarily pragmatists whose existence is devoted to "getting things done". Their obedience is not a pragmatic device. They are concerned first and foremost with the worship of God through the living of an evangelical life. The one thing more than any other that interferes with the fulfilment of the will of God in us is pride and selfishness in whatever way they operate. True obedience to authority is the most effective defence against the insidious attacks of selfishness.

For obvious reasons no branch of knowledge is so neglected as the knowledge of ourselves. In other sciences

knowledge flatters vanity; it exalts men in the eyes of others, it increases their influence in the world. But true self-discovery wounds our pride, and spoils the good opinion we formed and cherished of ourselves. We may be skilled in every other science and ignorant of this. We may be able to calculate the movements of the heavenly bodies, and know nothing of the movements of our own sinful nature. We may be able to climb a mountain summit where no human foot has ever before trodden, and yet be ignorant of the dimensions of the black mountain of evil in our heart. We may be able by chemical analysis to detect and decompose the material substances around us, and yet never analyse the motives by which we are influenced, and which colour and stain all our conduct. Self-love conspires with trust in ourselves to make dupes of us as regards our spiritual life. Proverbially, and in the verdict of all experience, love is blind; and if love be blind, self-love being the strongest, the most subtle, the most changeless, the most difficult of all love to eradicate is blinder still. Self-love will not see, as self-trust cannot see, anything against ourselves.

Painful and humiliating as the searching and exposure may be, the very beginning of a life that is all for God hinges upon our being absolutely honest with Him about our present spiritual condition. Until we are renewed in the spirit, our virtues are only taught practices grafted upon a corrupt bottom. Everything that we do will be a mixture of good and bad; our humility will help us to pride our charity to others, will give nourishment to our own self-love, and as our prayers increase so will the opinion of our own sanctity. Till the heart is purified to the bottom, everything that proceeds from it partakes of its impurity and corruption.

Utter abandonment to God is, then, the only way of blessing. The alabaster vase must be broken that the ointment may flow out to fill the house. The grapes must be crushed that there may be wine to drink.

Who would not give this hateful idol over to the glorious idol-breaker, Jesus Christ! He alone can rectify

and enlighten the judgment by his word. He alone can win the affections. He alone can purify the motives and intentions. He alone can conquer and reinforce the will. He alone can dethrone an usurper who will never abdicate. There is no hope for us but in Jesus Christ. He must fight for us. Our hateful self is his enemy too. He must vanquish it, subdue it, cast it out, or we can never get victory.

We shall do well to be on our guard against attempting to conquer self by any active resistance we can make to it by the powers of nature, for nature can no more overcome itself than wrath can heal wrath. Our very efforts to overcome it seem to give it new strength; self-love finds something to admire, even in the very attempts we make to conquer it. It will even take pride in what we mean to be acts of self-humiliation. There is no deliverance for us from this dread tyrant but in God. We are not skillful or brave or disinterested enough to wage this war alone. We must set ourselves against this foe which is His as well as ours, and while we strive in all things to work together with Him, we must trust Him to work for us and in us, till self shall lie slain by God's own breath.

As we progress in spirituality, it is no longer selfishness in its repulsive forms, but in its most deceitful and attractive dress. It may be described as consecrated selfishness, or selfishness for God. Now it takes the form of impulsive and intense earnestness. Work is undertaken because it seems to be of God, but the will of God has not been sought, nor has His strength been put on; hence creaturely energy takes the place of divine power. Now it takes the form of jealousy for God's glory, but bitter criticisms are indulged, and uncharitable thoughts are cherished, which reveal only too clearly the fever of a strong and subtle selfhood. This experience of reluctance to abandon self is a very painful one. It is nothing less than the losing of the life of nature, and the being filled with the life and fulness which is God.

What is needed is total conformity to the will of God. We have to put away from our lives everything that is out

of harmony with His will. The three great lines of self-surrender are: to be anything the Lord wants us to *be*; to do anything He wants us to *do*; to suffer anything He wants us to *suffer*.

As has been stated earlier true obedience to our superiors is the most effective way of guarding against selfishness and of surrendering the will to the will of God. It is the mightiest weapon against the strongest enemy of our spiritual life.

All that has been said thus far should not be construed to mean that the superior's will is automatically God's will. It would be theologically unsound to maintain that, no matter how a decision is made by the superior, it always coincides with the actual will of God, since the superior is God's representative. The fact that the superior commands a subject does not mean that God is issuing the command, or even that God wants the command issued at all! It may very well be the devil's spite on the part of the superior that is giving the command. The command issued may be a very unvirtuous act and may likewise be very displeasing to God and not willed by Him at all. God speaks to us through signs, and some of the most important means of reading these signs and of listening to the will of God are prayer, love, prudence, dialogue, consultation, knowledge of rules, knowledge of personal problems and needs of subjects, etc. Were a particular superior to neglect these means, he would more often than not fail to discern God's will for himself and his subjects. The same would be true of a superior who makes an arbitrary use of his authority or makes indiscriminate application of the letter of the law to every case or who is impervious to suggestions.

God Himself has never undertaken to guide superiors immediately and infallibly in every decision they make. Nor have they any private revelation from God whereby they can know for certain all that God wants from their subjects. The superiors are to use the normal human means to discern God's will. What is most important

is that in their own spiritual life, superiors remain within the will of God always. The authority they exercise should be the off-shoot of their personal spiritual life rather than depend upon the mere fact of their legal position. For superiors who are living lives of deep spirituality the assessment of the will of God for their subjects will be far easier than for those who are not such.

The superior is God's representative; he is not God's substitute. He must fit himself into the objective order of God's providence for his subjects. He must accept his own position under God and govern only in accordance with the will of God.

Be that as it may, we can believe that what the superiors command generally reflect the will of God for the subjects. Even if their decisions fail to be the very best, nonetheless they will be good enough and come close to what God wants. Even if what superiors command is not the actual will of God for the subjects, barring the case of sin, the subjects will do well to obey their superiors after having done the utmost to help the superiors find out the actual will of God for them. Obedience of this kind is always a sacrament of communion with God. Although God does not always support the commands of superiors, He always supports the subjects when they are obeying their superiors. The superior may make mistakes in commanding a particular thing. But the subject never makes a mistake in obeying in a responsible way.

The superior fails in his duty if he starts manipulating adult human beings as if they were mere puppets. Even as he gives commands he has the strict obligation to respect the human dignity of his subjects as persons. Superiors should not adhere to the attitude that because they represent God and share in His authority, they are God and have no responsibility to anyone but themselves for the exercise of their authority. They have a strict obligation in conscience to use their authority in accordance with ordinary personal morality. They are not above the moral law that guides and directs all interpersonal relationships

nor beyond the Christian laws of justice, fraternal charity, and tolerance. They are not beings devoid of all accountability nor yet people who are above human predictability. Superiors have no permission from God to be irresponsible in issuing commands and then to rely on His grace to compensate for and excuse their personal wilfulness. A superior can be as sinfully wilful in the use of his authority as a subject can in his refusal to obey. A superior who deliberately fails to respect the objective will of God in issuing orders, can be just as sinful as the subject who fails to respect the will of God in his submission to the superior.

B. The legitimacy of responsible disobedience

There can arise situations wherein the problem of obedience is linked to the safeguarding of the oppressed. The subject cannot throw off all personal responsibility and obey without question when he knows that following orders of superiors would mean serious harm to the poor and the downtrodden. There can be social goals and causes for whose sake a social activist may have to break a law or precept as a form of protest. He is never doing so for the sake of sheer personal gain.

In certain situations when the subject sincerely and humbly believes he is in possession of knowledge which is not available to the superior, he must inform him to enable him to make his decisions in the light of such knowledge. If this fails he must go beyond the immediate superior and take the issue to a higher authority; and if that is not feasible, he may humbly and respectfully refuse to obey. It is not the human command of the superior that is the ultimate source of one's obligation but the will of God as communicated to one through the totality of the situations.

Disobedience must always be "responsible". First, it must rest on a sound spirituality that develops empathy for the poor, the oppressed and those who suffer violence anywhere and one that involves a continual reflection on one's own life-style and motivations.

Secondly, respect for law and authority must not be undermined. Hence the disobedient person must be willing to accept the penalties provided for the act of disobedience. It is his willingness to accept the penalty that constitutes the force of his advocacy and encourages other people to think about the wrong that is being protested against. He disobeys because he has concluded that disobedience will enhance righteousness and justice; but as part of the righteousness he endeavours to preserve respect for law and authority.

Thirdly, responsible disobedience is deliberately but reluctantly enacted and is never the result of outbursts of passion or blind ventings of fury. In its tranquility, forethoughtfulness and ultimate respect for authority, responsible disobedience is unlike any other act of disobedience.

Fourthly, standard means of redress must have been tried. Disobedience must always be considered a final resort.

Fifthly, the responsibly disobedient person is one who is otherwise conscientious in fulfilling his responsibilities to the community and to its authority. He never rejects other obligations. The honourably disobedient person pursues his protest in a way that inflicts no direct or serious harm to any one.

Sixthly, even when the honourably disobedient one has the right to disobey, there is still the question whether he should exercise his right, that is, whether by doing so he is likely to further his genuine ends. He may be acting within his rights, but still his action may serve to provoke greater evils if it is poorly timed or not well designed to make the appeal to the sense of justice effective.

Now we proceed to discuss the theological reasons why disobedience may be justified in rare cases.

a. Responsible disobedience and traditional theology

We shall consider the perspective of Thomas Aquinas in this regard. What he says about authority and

resistance to authority throws ample light on the question of responsible disobedience. Virtue is essential for a ruler. Thomas carries out this thinking in the *Commentary* (2 Sent. 44, 2, 2), where he teaches that the commands of authority bind in conscience. He adds, however, that this authority may be defective either because the ruler's source of authority is illegitimate or because the ruler exceeds his authority. If the ruler is a usurper, there is no moral obligation to obey him. If he exceeds his authority and commands what is sinful, there is even a moral obligation to disobey him; if he exceeds his authority and commands what is not sinful, subjects are morally free to obey or not as they choose, except to avoid scandal or danger³.

When dealing with fraternal correction, he says that a subject may sometimes have to check a high dignitary of the Church, but always with humility and respect. Generally speaking Church leaders are to be corrected privately because of the reverence due to them; but in case of real need, they could be corrected even publicly as Paul did with regard to Peter (ST II-II, 33, 4, ad 2).

He also teaches that human laws are just and binding in conscience only if they satisfy three conditions: they are directed toward the common good, proceed from within the limits of the lawmaker's constitutional power, and lays burdens on subjects according to an equality of proportion. Laws may be unjust by being contrary to human good, as when an authority imposes on his subjects burdensome laws, conducive, not to the common good, but rather to his own cupidity or vainglory. Such laws are acts of violence rather than laws and do not bind in conscience, except perhaps in order to avoid scandal or disturbance (ST I-II, 96, 4).

Again, a subject may sometimes act beside the letter

3. Richard Regan, "Aquinas on Political Obedience and Disobedience", *Thought*, 56 (1981) pp. 77-88,

of the law. Every law is directed to the common good and derives the force and nature of law accordingly. Now it happens often that the observance of some point of law conduces to the common good in the majority of instances, but in some cases, very hurtful. Since then the lawgiver cannot have in view every single case, he shapes the law according to what happens most frequently, by directing his attention to the common good. Therefore if a case arises wherein the observance of that law would be hurtful to the general welfare, it should not be observed (ST I-II, 96, 6).

What is said of laws, may be applied to precepts, statutes and commands, for these latter differ from laws only insofar as they are limited to smaller groups, often to individuals only, or if imposed upon a public community, are merely a temporary injunction. Under the moral aspect, there is hardly any difference between this group of ordinances and human laws ⁴.

The tradition of Catholic moral theology, therefore, has made allowance for certain types of disobedience, although it has not considered the precise forms this disobedience might take.

b. Responsible disobedience and history

Conscientious defiance of laws and orders are old in human thought and action. Scripture and history give numerous illustrations of conscientious violations of particular laws and commands. In the OT the Book of Esther presents two instances of people who, from faithfulness to God, violated the king's law. The Jewish people, in fact, were saved by acts of courageous lawbreaking (Esth. 3: 2-8; 4:10-11, 16). In the NT, Peter and Paul taught conformity for conscience's sake (1 Pet 2:17; Rom 13:1-2). They believed, however, that "one must obey God rather than men" (Acts 5:29).

4. Joseph Fuchs, *Theologia Moralis, Generalis*, I, Rome, 1960, p. III; Henry Peschke, *Christian Ethics*, I, Bangalore, 1981, p. 122.

Several of the early Christians left illustrations of responsible disobedience, committed primarily to preserve personal integrity⁵. Maximilianus (295 A.D.) is a clear example of responsible disobedience in his rejection of military service⁶. This young man saw no hope of changing the social structure of his time; nonetheless, he refused to serve in the army, since to do so would violate God's command not to kill. He was eventually killed by the state for his refusal to kill, but he felt he was preserving the integrity of his soul.

The story of one of England's greatest Catholic bishops and scholars brings out most clearly the nature of responsible disobedience to papal or, for that matter, any legitimate authority. "I disobey, I contradict, I rebel", was the answer of Bishop Robert Grosseteste to an order from the Pope.

Robert Grosseteste has been described as a "man of universal genius". He was one of the first chancellors of Oxford University. Has he not been a churchman he would still have world reputation as a natural scientist, a man with a truly scientific mind at whose clear-headedness and insight contemporary historians of science are bound to marvel. He knew Greek and Hebrew, was an outstanding student of the Greek Fathers, and was responsible for many translations and commentaries including the first complete Latin version of Aristotle's *Ethics*. Bishop Grosseteste was also a great biblical scholar. He became the bishop of Lincoln in 1235 at the age of sixty. As bishop he was distinguished by the conviction that the care of souls directed by a responsible and singleminded episcopate must be the aim of ecclesiastical policy.

Robert Grosseteste certainly believed that the pope possessed the plenitude of power which he had the right

5. Cf. Mulford Sibely, *The Obligation to Disobey*, New York 1970, pp. 88-89

6. Cf. Adolf von Harnack, *Militia Christi: Die christliche Religion unter der Soldatenstand*, Tübingen, 1905, pp. 114-117

to exercise freely; but he accepted the medieval view that this was not a power given to the pope to use as he liked, but was an office entrusted to him and instituted for the service of the whole Body. The pope's power had been given to him for the care of souls, to build up the Body of Christ and not to destroy it. He was the Vicar of Christ, not Christ Himself, and must exercise his power in accordance with the will of Christ and never in manifest opposition to it. God forbid, that the Holy See should be the cause of an apparent schism by commanding faithful Catholics to do what was contrary to Christ's will.

The issue which provoked Bishop Grosseteste's refusal to comply with what he considered to be an abuse of papal power was that of the papal provision of benefices. Innocent IV had become dependent upon the system of papal provisions to maintain his Curia and to bribe allies to fight in his interminable wars with the Emperor Frederick II. His political ambitions took precedence over the care of souls. In 1253, the Pope nominated his own nephew, Frederick of Lavagna, to a vacant canonry in Lincoln Cathedral. Grosseteste was faced with a legal command from the Sovereign Pontiff, which apparently must be obeyed, and yet the demand, though legal, was obviously immoral, a clear abuse of power. The pope was using his office as Vicar of Christ in a sense quite contrary to the purpose for which it had been entrusted to him. The Bishop saw clearly that there is an important distinction between what a pope has a legal right to do and what he has a moral right to do. His response was a direct refusal to obey an order which constituted an abuse of authority. The pope was acting *ultra vires*, beyond the limits of his authority, and hence his subjects were not bound to obey him.

c. Responsible disobedience and Jesus

For Jesus obedience meant consecrating himself entirely to the mission his Father entrusted him. His first words on record are: "Did you not know that I must be busy with my Father's affairs?" (Lk 2:49) From the outset,

Jesus was motivated by a sense of mission. Jesus was constantly aware of having a mission to fulfil, a mission determined by his Father (Jn 7:28). Carrying out this mission was the content of his life. The obedience of Jesus stems from the sense of mission and manifests itself in loving service. The same obedience makes him defy some of the laws and authorities of his time.

The Gospels do not leave us the slightest doubt that Jesus, judged by the standards of his religious environment, was often "disobedient", and that it was probably the very fact that sent him to the cross. There is no doubt about Jesus' devotion to the law. Jesus took the obligations of a devout Jew very seriously, even when the Scriptures made no clear-cut demands: his going to the temple, his prayers, his familiarity with the Old Testament, and his directions on religious and moral questions. Jesus underwent John's baptism of repentance.

So the problem is, not whether Jesus was devout, but, whether and why the devout Jesus was "disobedient". We do well to bring this out in the clearest possible way, since Jesus is not looked upon, either in the Gospels or in the Christian world, simply as a representative of human and specifically Jewish piety. On the contrary, it is precisely in what we may call his "disobedient" or "liberal" attitude that the historian, too, regards him as being in contrast to the pious Jews of his time and even to John the Baptist. The early Christian world brought out this contrast to the conventional type emphatically, once for all, with the messianic title and their Christology. Thus the liberal attitude of the Messiah, the Christ, the Son of God, is the kernel of the problem that is raised here. It is part of the christological scandal, first to the Jews and later again and again in the history of the Church.

Whatever else Jesus may have been, he was a "liberal". In the name of God and in the power of the Holy Spirit he re-interpreted and appraised Moses, the Scriptures and dogmatics from the point of view of love, and thereby allowed devout people to remain reasonable and human.

The Apostles followed the Lord in this regard. For them too fidelity to the mission entrusted by Jesus constituted obedience. So strong was their sense of mission that they defied the explicit orders of the Sanhedrin, the legitimate authority in Israel, not to preach in Jesus' name (Acts 5: 29). In the existing circumstances, this was nothing but responsible disobedience.

d. Responsible disobedience as expression of the prophetic element in the Church

In the words of Karl Rahner, the figure of the prophet is a unique phenomenon in the history and sociology of all religions. In spite of a certain fluidity of roles, and an actual identification at times, the prophet is different from the priest, who is the minister of divine worship. Worship, being in more or less set terms and gestures and its validity being established by tradition; it can be passed on to new officials in an institutionalized way. The prophet, on the contrary, always comes forward with a new message. He has to produce his own credentials. His task cannot be, strictly speaking, institutionalized. Hence the uniqueness of his vocation is essential to the prophet. He is the envoy of God. He is always to some extent the religious revolutionary, and since religion and society form a unity, he is often the critic of society speaking in the name of his God. The prophet is the "bearer of revelation".

Prophetism is not alien to the Church because the Church itself is the permanent presence of the word of the prophet, Jesus Christ. Within this fundamental prophetism, there is again a prophetic element, inasmuch as the charisms are of the essence of the Church, in spite of all its institutions. Of their nature, the spontaneous charisms which work in and for the Church are prophetic. They do not cease to be prophetic because they must remain within the "order" of the Church, though possibly only at the cost of grave conflicts. For the "order" of the Church is itself nothing else than a participation in the prophetic charge of Christ. This charismatic prophecy in the Church

helps to make the message of Jesus new, relevant and actual in each changing age⁷.

The inability to change or to adapt, to confuse traditions with Tradition is a grave drawback of every human institutionalized group, and the Church is no exception to this rule in spite of the fact that her authority to rule and to organize is from Christ.

It is a fact that God works outside the Church proper and that even within the Church there is no strict equation between hierarchical action and action of God. In this, the hierarchy must simply and humbly recognize God's action wherever it appears.

There have been, in fact, few reforms and reform groups which have been initiated by a bishop or pope. Practically all the modern revolutions, from a social point of view, have been conceived outside the Church and sometimes in opposition to it: democracy, religious liberty, the social, the psychological, the scientific revolution, woman's suffrage and finally the slave problem and civil rights. The general rule has been that God has chosen others than the hierarchy to announce His special designs for the Church at any particular time: St. Francis, St. Dominic, St. Ignatius, St. Catherine, St. Teresa of Avila, St. Theresa of Lisieux, and others. That is why we say that the Church's mission to the world must be a vigilant one, ready to recognize God's work in the world as well. Thus, the movements for peace, social justice, human dignity, concord between men, alleviation of hunger are all good works no matter by whom they are done. The Church can only recognize them, bless them, and further them by its active cooperation and collaboration.

The third world appears to be the ideal place for prophetism to thrive. Emerging as it does from the shack-

7. Karl Rahner, "Prophetism", *Encyclopedia of Theology*. London, 1981, pp. 1286-1289

les of oppression and poverty, it has the greatest need of the prophet's social justice.

Among other things prophetism is a ministry in daring, confrontation and responsible disobedience. Religion itself was never rejected by the prophets, but ritual abuses came in for stringent censure. Passionate indignation against legalistic ritualism divorced from zeal for moral integrity and social justice made the OT prophets confront with the *status quo* and with a religion without works (Is 1:10-17; 58:1-12; Am 5:21-27; Jam 2:14-17).

Any suffering from lack of human dignity through injustice, oppression, poverty, hunger, discrimination, etc., should arouse the prophet in every Christian. The appalling failures of the Church in the realm of social justice need an active prophetic daring on the part of its members, especially of priests and religious, to plunge into the struggle for justice for all. Nothing could be plainer than that there is no room in the Gospel of Jesus Christ for discrimination and prejudice or exploitation. And if there is such ample room for them in the Church it is only because there is so little room in the Church for the Gospel of Jesus Christ. To cope with these matters the Church needs, among other things, strong prophetic figures.

As Vatican II explains: "God's holy people shares also in the prophetic function of Christ..... The Holy Spirit distributes among the faithful of every rank special graces that make them fit and ready to undertake various tasks and functions conducive to the renewal and further development of the Church" (LG 12; see also 35). This can easily result in an increase of tension between institution and prophecy, between authorities and prophets. When it is the work of the Holy Spirit, such tension even if painful, is always creative.

e. Responsible disobedience as obedience to the spirit of the law

When the letter of the law conflicts with the spirit

of the law we may in certain cases, disobey the law. Charles Curran lists several reasons why the letter of the law may conflict with the spirit of the law⁸. The first reason is that the fundamental law for the Christian and for the Church is the law of the Spirit, which is primarily an internal law. There is a need for external law in the Church, but this external law must be in conformity with the demands of the internal law. Obviously this is the first source of tension in the life of the Christian. The external law might not always correspond to the demands of the Spirit here and now. A second reason why there can be clash between the letter and the spirit of the law is the pilgrim nature of the Church. Precisely because the Church has not yet arrived at its final goal and perfection, there will always be the possibility of conflicting demands. The pilgrim Church must constantly renew its laws, but actual change might lag behind the changes that have already occurred in the life of the community itself. A third reason for tension is common to all societies and communities - the tension between the individual and society itself, because they are neither totally independent nor totally dependent on each other. In this tension one finds the theological reason for some form of responsible disobedience. When the law interferes with the inalienable rights of individuals, then it can no longer be a binding law.

A fourth reason for tension is the very nature of positive law itself. Most Catholic theologians teach with St. Thomas that positive law admits of exceptions. Since positive law is not based on immutable essences but on changing circumstances, the legislator cannot possibly foresee all the different circumstances that might arise in a particular case. There are times when the letter of the law can become an injustice to an individual. In fact, the very imperfection of positive law appears more readily in the Church than it does in many secular societies and states. Consider the difficulties involved in framing laws

8. Charles Curran, *A New Look at Christian Morality*, Notre Dame, Ind., 1970, pp. 134-143

for people living all over the globe, in completely different climates, with opposing cultural formations, with no common heritage, with differing languages and customs. A law enacted for a greater number of people living in very disparate circumstances will necessarily admit more exceptions than a law made for a more homogeneous grouping of people. A fifth reason for conflict comes from the possibility of human error. The Apostolic Constitution *Veterum Sapientia*, is a conspicuous example of error on the part of the lawmakers in the Church.

Catholic moral theology has always admitted built-in safeguards to deal with the possible tension between the letter of the law and the spirit of the law. The best safeguard is the virtue of epikeia. Thomistic teaching maintains that it is a part of the virtue of justice precisely because of the inherent imperfections of human law. It is not a lazy attempt to escape from certain obligations, but rather the response to a higher law, the law of justice. Epikeia has been called the crown of legal justice and the virtue of the spirit of the law. It is closely connected with the virtue of prudence.

Epikeia is always a demand of the higher law, the law of the Spirit. The individual is trying his best to conform himself to the call of the Spirit in a particular situation. Openness to the Spirit is completely incompatible with irresponsibility and a selfish seeking of the easiest way out in a given situation.

If there is a disproportion between fulfilling a law or precept as it is expressed on the one hand and the inconvenience or damage connected with the fulfilling of the law or precept on the other, the virtue of epikeia will rightly apply the law to the situation in a way that will contradict the words of the law or precept.

Conclusion

The pope is Simon Peter's successor and as such has a unique function in the Church. This is clear from

the words of the Lord: "You are Peter, and on this rock I will build my church" (Mt 16: 18). But, immediately after saying these words, the Lord said also other words about Peter, words that point to the weaker aspects of the Petrine Office. "He turned and said to Peter, "Get behind me, Satan! You are a hindrance to me; for you are not on the side of God, but of men" (Mt 16:23). These words are as pertinent as those of Mt 16:18, in helping us understand the position of Peter and his successors in the Church (and by implication the position of other authorities in the Church). If the characterization of Peter as rock is very important for the life of the Church, his characterization as Satan is at least of some significance for it. The Gospel seems to say that although Peter is the stabilizing factor in the Church, he can still make mistakes. We see Paul opposing and correcting Peter who was already pope then: "When Cephas came to Antioch I opposed him to his face, because he stood condemned" (Gal 2: 11). When Peter made himself one with those who favoured circumcision, Paul opposed him. An ecclesiology that overlooks the possibility of error in the popes and other authorities in the Church and that of their being legitimately opposed and corrected, does not seem to be faithful to the Gospel teaching.

This fact seems to have urged Vatican II to state: "Where public authority oversteps its competence and oppresses the people, these people should nevertheless obey to the extent that the objective common good demands. Still it is lawful for them to defend their own rights and those of their fellow citizens against any abuse of this authority, provided that in so doing they observe the limits imposed by natural law and the gospel" (GS n. 74).

A Christian is expected to be loyal to the Church. Loyalty to the Church, however, is not the same thing as an unquestioning acceptance of every practice that is prescribed by Church leaders. A Christian's first loyalty is to Christ. Blind and silent admiration of everything in the Church is far from true loyalty. Loyalty demands that

we make a critical evaluation of how far the Church is living up to the Gospel message. If such an evaluation implies that a Christian should express himself against the establishment, he must be willing to do so but with due respect for the authority. The establishment, on its part, must listen to him with openness. In such situations, some embarrassment to the Church authorities is unavoidable.

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